



## Microsoft Dynamics Customer Solution Case Study



*Solutions for every promotion*

### Overview

**Country or Region:** Australia

**Industry:** Promotions

### Customer Profile

Founded in 1994, Global Advertising Products (Global) provides promotional products for clients across Australia. It employs 18 full-time staff and has offices in Albury and Sydney, New South Wales.

### Business Situation

Global was struggling to manage its sales process using an outdated customer relationship management (CRM) application. The inefficient system lacked visibility, reduced staff productivity and was a drain on customer service.

### Solution

Global worked with Microsoft Gold Certified Partner Aspirence Information Technology to implement a customised CRM system based on Microsoft Dynamics CRM. Global also implemented a formal sales process.

### Benefits

- Increased revenue by 22 percent in 12 months.
- Improved customer service.
- Formalized sales process.
- Increased control and transparency.
- Boosted staff morale.

## Global Advertising Products Lifts Revenue, Streamlines Operations with CRM Solution

“In the past year, the Microsoft Dynamics CRM system has helped us increase sales from A\$2.7 million to A\$3.3 million. And I believe that’s just the beginning of what it’s capable of.”

Neil Baillie, Managing Director, Global Advertising Products

Promotional products provider Global Advertising Products (Global) relied on an outdated system to manage its critical sales process. The company needed to overcome flat sales, inefficient processes and flagging productivity if it wanted to boost its standing in a competitive market. Global worked with Microsoft Gold Certified Partner Aspirence Information Technology to develop a highly customized customer relationship management (CRM) application based on Microsoft® Dynamics™ CRM. The new system helps Global drive a standardized sales process for new business opportunities and relationship management. This has improved customer service, boosted revenue, provided greater control, increased transparency and lifted staff satisfaction.

## Situation

Global Advertising Products (Global) was founded in 1994. It is headquartered in Albury, New South Wales, and has a second office in Sydney. The company provides products to support its customers' promotional activities, such as conferences, special events and trade shows. These products range from branded notepads and pens to creative themed solutions. Global also has a screen printing business to produce banners, signs, stickers and bunting.

Global's salesforce is the key to its business. The company's five account managers are responsible for growing the company by expanding existing accounts and winning new customers.

Global was using a database to keep track of its sales activity and customer details. However, this outdated system experienced frequent outages and provided only limited integration with the company's other business applications.

"The system we were using allowed us to manage existing customers, but gave us no transparency into the opportunity generation – or new business – side of things," says Neil Baillie, Managing Director of Global Advertising Products. "We had no visibility into our sales pipeline, how many leads we were receiving and how relationships were starting. This meant we couldn't see how many of the leads generated from pre-quote activities were being converted into sales.

"Our sales were flat – we were not generating repeat business from existing accounts; we were missing cross-selling opportunities and acquiring very few new accounts."

In addition, the company was suffering from an unstructured sales process.

"We used to think that we could grow the business by hiring more account managers, training them, providing support such as catalogue mailouts and then leaving them to develop a client list," says Baillie. "We realized this was a flawed approach. Training the account managers was difficult because they were expected to do everything from putting a quote together to following up opportunities and managing jobs. If account managers left, we were very vulnerable because it took so long to train them and they took so much knowledge with them."

## Solution

Global asked Microsoft Gold Certified Partner Aspirence Information Technology to propose a technology solution to help improve its sales process. Aspirence suggested implementing a customer relationship management (CRM) system based on Microsoft Dynamics CRM 3.0 running on Microsoft® Windows® Small Business Server 2003.

"Microsoft Dynamics CRM is a highly configurable, flexible product," explains Natalie Granger, Marketing Manager at Aspirence Information Technology. "While it has excellent out-of-the-box functionality, you can't buy what Global wanted, so we decided to invest in an application that would allow extensive customization. Dynamics CRM was the answer."

Aspirence conducted workshops with Global to understand exactly what it required in a CRM system.

"We had a very clear idea of what we wanted, and Aspirence took the time to understand what we wanted in the product and what we wanted to achieve and translating this into a technology environment that would drive business success," says Baillie.

“Aspirence’s knowledge of Dynamics CRM enabled them to build a very complex, functional application that’s hidden behind a simple, process-driven user interface. All the complexity is hidden, so the application is very easy for staff to learn and use.”

Aspirence implemented Dynamics CRM running on Microsoft Windows Small Business Server 2003 with a Microsoft SQL Server 2005 back end.

But an effective technology infrastructure was only half the solution. Global realized that to get the full range of benefits from the new CRM system, it would need to change its business processes. So it implemented a formal sales process that included set ways of doing things and follow-up actions for every step in the sales cycle – from taking the first call to preparing and adjusting a quote and closing the sale.

Implementing this process involved completely re-engineering the business. Account managers are now only responsible for generating opportunities, managing customer relationships and closing sales. Global built a projects department to handle all quoting; increased its processing department to look after all job management functions; and added a promotions coordinator to develop campaigns to generate opportunities from new and existing accounts.

“We knew that just implementing a CRM system wouldn’t solve all our problems, because the way we were managing opportunities was inefficient and inconsistent,” says Baillie. “So we implemented a technology infrastructure in parallel with this formal sales process. We then customized Dynamics CRM to mirror and drive that process.”

Staff using the Dynamics CRM system must follow set steps and enter required information. There are only ever a certain number of next steps to take or options to choose from, which has significantly standardized and streamlined the sales process.

The solution went live in early 2007, following six months of development and customization.

## Benefits

Implementing Dynamics CRM in conjunction with a formal sales process has changed the face of Global’s business. Gone are the days of inefficiencies, lack of transparency and lost opportunities.

### **Improved customer service with defined workflow**

Using Dynamics CRM as a platform to guide staff through a streamlined, standardized sales process allows Global to provide a consistent customer experience. Sales staff no longer miss opportunities, as all communication with customers is recorded in the CRM system. When speaking with customers, staff are more informed and up to date and have access to order and relationship histories.

“The Microsoft system drives our business process and increases success,” says Baillie. “For example, for every call made to a customer, the account manager must enter an outcome and then select a next step. There’s a number of steps that can be selected, but it’s all leading to a single point. This allows us to work with great purpose.”

Understanding more about customers also allows Global to create targeted and controlled campaigns, increasing opportunities for cross-selling in existing accounts and generating new business.

“In a perfect world, we’d only talk to customers when they are ready to start planning their next promotion,” says Baillie. “Dynamics CRM brings this ideal closer, because we can track when customer projects are coming up and schedule calls around those timetables. Our business is all about building relationships and the key to that is good communication. The application allows us to really fine-tune and target our communications with customers.”

#### **Greater control and transparency**

Dynamics CRM ensures nothing is left to chance. The system gives account managers prioritized opportunity management and generation lists. This ensures they make follow-up calls on time, maximize opportunities and follow set business rules to achieve optimal results.

The detailed reporting functionality in Dynamics CRM allows management to see exactly what is going on in areas such as sales process and performance at any given time. Increased access to accurate, up-to-date and complete information has dramatically improved decision making and strategic planning.

“We also have much greater transparency and insight into what’s working and what isn’t from the reports we pull out of the system,” says Baillie. “We’re getting away from a more amateur approach to a more professional operating model.”

Natalie Granger from Aspirence agrees: “The Dynamics CRM system has allowed Global to transform the business into a customer-focused organization. The system gives management a 360-degree view of the business and the customer.”

#### **Increased revenue**

The improved ability to track sales activity, systematically follow up leads and target

communications has increased Global’s chances of reaching the crucial step in the sales process – presenting a proposal to the customer.

“In the past 12 months, we’ve increased the number of proposals we put in front of customers from 52 per week to 59,” says Baillie. “With an average sale of around A\$2,500 and a conversion rate of about 50 percent, it all adds up. In the past year, the Dynamics CRM system has helped us increase sales from A\$2.7 million to A\$3.3 million. And I believe that’s just the beginning of what it’s capable of.”

#### **Boosted staff satisfaction**

Creating more defined roles for account managers and focusing their efforts on opportunity generation and management means they can be more efficient and effective. This has boosted staff productivity and increased morale.

The simplicity of the user interface has also dramatically reduced the training required for new staff and reduced the effect of staff leaving on the business.

“The system is easy for staff to use and ensures there’s no confusion around what’s expected of them,” says Baillie. “Our account managers are thrilled with the system because it helps them manage their workloads and supports them in their work. It helps them succeed, which increases their motivation, which in turn increases the success of the company as a whole.”

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about Aspirence Information Technology products and services, call +612 6049 5999 or visit the Web site at: [www.aspirence.com.au](http://www.aspirence.com.au)

For more information about Global Advertising Products products and services, call +612 6022 6200 or visit the Web site at: [www.adproducts.com.au](http://www.adproducts.com.au)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: [www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Products
  - Microsoft Dynamics CRM 3.0
  - Microsoft Office 2003 Professional
  - Microsoft Windows Small Business Server 2003
  - Microsoft SQL Server 2005

### Hardware

- IBM System x226 server

### Partners

- Aspirence Information Technology