



## Microsoft Dynamics Partner Solution Case Study

### Adding value for customers through a hosted customer relationship management solution

#### Overview

**Country or Region:** United States

**Industry:** Publishing

#### Partner Profile

Based in Lincoln, Nebraska, Sandhills publishes trade magazines (and their Web counterparts) for the heavy equipment, agriculture equipment, aircrafts, over the road trucks and personal computing industries, including *Machinery Trader*, *Truck Paper*, *PC Today*, and others.

#### Business Situation

Many of Sandhills' advertisers lack the resources to support a sophisticated customer relationship management (CRM) system—but risk missing sales opportunities without one.

#### Solution

Sandhills decided to offer hosted Microsoft Dynamics™ CRM to its equipment dealer advertisers as part of its broad suite of online Dealer Services package.

#### Benefits

- Adds value for dealers
- Helps dealers track inventory
- Links inventory to advertisements in Sandhills' publications
- Helps Sandhills satisfy and retain customers

“By hosting Microsoft Dynamics CRM as part of our Dealer Services package, we're providing our customers with something they can't get anywhere else. That keeps them coming back.”

Kim Mehring, Manager of Hosted Solutions, Sandhills Publishing

Many of the heavy equipment dealers that advertise in publications such as Sandhills' *Machinery Trader* have only a few salespeople. They often have very basic lead tracking systems, some consisting of little more than scraps of paper with scribbled names, phone numbers, and equipment descriptions. If a sales representative should leave the company, the leads often leave in their pockets. Sandhills saw that these dealers could benefit from having a more sophisticated customer relationship management (CRM) system but often lacked the infrastructure and resources to support one. So, Sandhills decided to integrate Microsoft Dynamics™ CRM into its online Dealer Services package. This has made it easier for dealers to track sales and inventory—and created an even more attractive service offering that keeps advertisers working closely with Sandhills.



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## Situation

Twenty years ago, the world of buying and selling heavy equipment was a simpler one. *Machinery Trader*, one of the well-known trade magazines from Sandhills Publishing, was a ready resource. A contractor looking for a used crawler dozer, for example, could find in its pages a list of all the crawler dozers for sale nearby, complete with pictures and detailed specifications. The contractor or dealer selling the equipment created an ad by sending photos and copy to a graphic designer, who pasted up the magazine by hand. The prospective buyer would call the seller; the seller would jot notes on a scrap of paper; and if they were fortunate the deal would go through and everyone would be happy.

The world has grown more complex. *Machinery Trader* magazine still exists, and it has been augmented by [www.machinerytrader.com](http://www.machinerytrader.com). As for layout and design? There's no paste anywhere in sight;

everything is done electronically, and hardly anyone uses "snail mail" to deliver photos and copy to Sandhills.

In the field, though, among the companies buying and selling heavy equipment, some things have remained relatively unchanged. Many of the companies with which Sandhills works have between 5 and 20 employees. They often lack the resources to deploy and support a modern customer relationship management (CRM) system that would make it easier to manage customers, inventory, and sales leads. As a consequence, many of these companies have lead tracking and inventory control systems that still rely on scraps of paper and notes jotted in the margin of legal pads.

Yet Sandhills is quietly fostering a technological revolution among its customers. Understanding its customers might not deploy such a solution on their own, Sandhills has begun to offer them access to Microsoft Dynamics CRM as a hosted service. Using either Microsoft® Office Outlook® or Microsoft Internet Explorer®, Sandhills' customers can access all the key CRM functions enabled by Microsoft Dynamics CRM—including customer and lead tracking, inventory control, and more. Moreover, as part of its Dealer Services offering, Sandhills has integrated Microsoft Dynamics CRM into its own advertising and publishing system—so its customers can easily enter pictures and information about machinery in inventory and instantly upload that information to Sandhills' publishing system, where it is pushed into *Machinery Trader*, *machinerytrader.com*, *Truck Paper*, *truckpaper.com* and/or other publications.

## Solution

Microsoft Dynamics is a line of integrated, adaptable business management solutions that managers can use to make business decisions with greater confidence. Microsoft



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Michael Porter, Vice President of Sales, Truck Center of Fort Worth

Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship, and supply chain processes in a way that helps drive business success.

Microsoft Dynamics CRM is a customer relationship management solution that provides the tools and capabilities needed to create and easily maintain a clear picture of customers, from first contact through to purchase and post-sales. With modules for sales, marketing, and customer service, Microsoft Dynamics CRM delivers a fast, flexible, and affordable solution that drives consistent, measurable improvements in every business process, enabling closer relationships with customers and helping to achieve new levels of profitability.

Today, more than 900 companies have subscribed to the hosted Microsoft Dynamics CRM component of Sandhills' Dealer Services offering. There are more than 1,000 registered users, and Sandhills officials say that they're adding an average of 20 users each day. Each user has access to the full range of features and functions of Microsoft Dynamics CRM, and Sandhills places no limits on resources or disk space a customer uses.

“We wanted Microsoft Dynamics CRM to be a solution that dealers can use to do *all* their marketing, sales, mail merges, and everything else,” says Kim Mehring, manager hosted solutions. “So, when you sign up for Sandhills' Dealer Services, you get access to everything. You might not use all of it. You might not even use 10 percent of what's there. But it's *there*, and as dealers become more familiar with the functionality that Microsoft Dynamics CRM affords they can take greater advantage of it.”

#### **Hosting for High Availability and Ease of Access**

Sandhills runs its hosted Microsoft Dynamics CRM service from redundant data centers in Lincoln, Nebraska, and Scottsdale, Arizona. The service relies on 10 IBM BladeCenter servers (5 active/5 redundant) running the Microsoft Windows Server® 2003 operating system. Each server is configured with Intel processors. Microsoft SQL Server™ 2005 supports the hosted Microsoft Dynamics CRM offering, and the BladeCenter servers running SQL Server are configured with dual-core Intel processors and 8 gigabytes of memory for performance advantages. Two HP All-in-One Storage Systems (1 active/1 redundant) provide shared data storage for this and Sandhills' premium hosted messaging service, which is based on Microsoft Exchange 2003.

Sandhills takes advantage of the Microsoft Service Provider Licensing Agreement (SPLA) to offer hosted Microsoft Dynamics CRM, so it pays license fees on a per user/per month basis, and Sandhills only pays license fees for the number of users subscribing to the system at any given time. Sandhills includes a single user license to Microsoft Dynamics CRM as part of its Dealer Services package; dealers can add additional users for a nominal fee, which covers the cost of additional seats under the terms of the SPLA.

Dealers can access Microsoft Dynamics CRM using either Microsoft Internet Explorer or the Microsoft Dynamics client for Microsoft Office Outlook. “We use a combination of both,” says Greg Loseke, manager of Dealer Services for the Sandhills CRM initiative. “If you're using the Outlook client, you can track your e mail messages right against the customer record in Microsoft Dynamics CRM. You don't have to rekey comments or anything. There's also an additional menu bar with the Outlook client that provides access

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Jason Nadaskay, Sales Manager, H.O. Penn Machinery

to other Microsoft Dynamics CRM tasks and activities.”

#### **Customized to Meet Dealer Needs**

Companies buying and selling heavy equipment have special concerns and requirements, and Sandhills has customized certain areas of Microsoft Dynamics CRM to accommodate these industry-specific requirements. For example, it has created an industry specific inventory management system inside Microsoft Dynamics CRM that enable a dealer to capture and maintain equipment information. Dealers can identify which features are present in a given piece of equipment, how long the equipment has been in service, and more.

#### **Benefits**

For Sandhills’ dealer customers, hosting Microsoft Dynamics CRM as part of its Dealer Services offering provides several distinct benefits. It gives dealers access to a powerful CRM system with which to manage their marketing, sales, and inventory management tasks. It integrates with Sandhills’ publishing system, making it easy to promote equipment through Sandhills’ paper and electronic publications. And it delivers these benefits without demanding additional local computing or support resources. For Sandhills, in turn, these benefits translate into greater customer satisfaction and retention.

#### **Ease of Lead Access**

Consider the experience of Michael Porter, vice president of sales at the Truck Center of Fort Worth. The Truck Center is a family-operated, independent truck dealer that provides parts, servicing, and truck and trailer sales primarily to customers in the oil and gas industry. Porter had been looking for a CRM solution when Sandhills contacted him at the end of 2006.

“My desk was getting filled up with notepads,” says Porter. “The only thing I had here was Microsoft Outlook, which is fine for e mail, but I needed something that would help me track my leads and then convert my leads and follow up. When Sandhills told me that they were adding Microsoft Dynamics CRM to their Dealer Services offering, I stopped looking for anything else. I decided before I even saw this that I'd be going with them. A lot of that was simply a trust issue, because I trust Sandhills. We've been advertising with them non-stop for 15 years, and I know that anything they're doing, they're doing because it's going to help me.”

And Porter’s experience with hosted Microsoft Dynamics CRM has fulfilled his early expectations. “For every call that comes in, I try to set up a lead immediately,” Porter explains. “I try to capture the contact information, notes about what we've talked about. As I send out quotes, I run them through Microsoft Dynamics CRM so I can track the history.

“I can even attach files on my hard drive to different leads,” Porter goes on to say. “I create quotes and store them on my hard drive, but I've discovered that I can attach them to the contact information in the CRM system—so all the data is there and I don't have to go searching for it on my hard drive later on.”

This ease of access to customer and lead information has made a discernable difference to Porter and the Truck Center of Fort Worth. “I'm actually spending more time selling equipment than I was before,” he says. “From a cost-benefit perspective, working with the Microsoft Dynamics CRM component of Sandhills’ Dealer Services enables me to spend my time producing sales rather than tracking down a notebook that had someone's name in it from a month ago.”

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### **Ease of Advertising**

Jason Nadaskay, sales manager at H.O. Penn Machinery in Bloomingburg, New York, has had similar experiences using the Microsoft Dynamics CRM component of Sandhills’ Dealer Services system. H.O. Penn is a Caterpillar equipment dealer, selling everything from compact construction equipment to mining equipment. Nadaskay does not maintain the full H.O. Penn inventory on Microsoft Dynamics CRM but he does use the system to manage leads and streamline advertising in several Sandhills publications.

“The way I’ve got Sandhills’ hosted Microsoft Dynamics CRM set up on my screen, I can post used equipment and attachments right to the Sandhills’ publishing system,” says Nadaskay. “I can post year, manufacturer, model number, hours of service, serial numbers, my stock numbers, my list price, and more. The system can tell me if I’ve uploaded any pictures, too, which is nice because if I’m listing 50 or 100 machines I can quickly see which ones have pictures and how many, which ones have no pictures, and so on.”

The customized fields that Sandhills has added to Microsoft Dynamics CRM are particularly useful to Nadaskay. “Anyone in the market for this kind of equipment wants to know what year it is, how many hours it has been in service, what condition it’s in—and I have room for all that information. If they’re looking for an attachment, I can describe the attachment, put in part numbers, indicate compatibility with what equipment, and more. It definitely covers all the bases I need to cover. Sandhills has definitely configured this so that it’s very user friendly.”

It’s fast, too. “I can go out today and use my digital camera to take some pictures of a

machine that just came in, download the photos to my system, label the pictures, start a new ad entry in Microsoft Dynamics CRM, attach all my data and my pictures, and push it up to machinerytrader.com. I can do all that in an hour or two—maybe less, depending on how much the phone is ringing.”

And if the phone is ringing and Nadaskay gets distracted and makes a mistake? “If I need to make a quick change,” says Nadaskay, “I just open up Microsoft Dynamics CRM, make my change, and it shows up on the Sandhills Web site.”

“I can’t put a dollar amount on what this saves us in time,” Nadaskay goes on to say, “but it does save us time. We can put up advertising more quickly, and that’s valuable. *Machinery Trader* is the best magazine out there and it delivers the best results. I’ve put machines up on the MachineryTrader.com site at nine in the morning and sold them before noon. Sandhills’ publications are known around the world, and a lot of people go there for equipment.”

### **Keeping the Customer Satisfied**

For Sandhills, hosting Microsoft Dynamics CRM is one more way to help expand its relationship with its customers.

“By hosting Microsoft Dynamics CRM as part of our Dealer Services package, we’re providing our customers with something they can’t get anywhere else,” says Mehring, “and that keeps them coming back. We don’t have long-term contracts with our customers, so we’ve got to find ways to keep them happy and wanting to come back.”

That’s the way it has been at Sandhills for the past 25 years. As its customer needs have evolved, Sandhills has evolved its services to continue to add value. “We know how valuable our customers are to us,” says Loseke, “so we have always tried to make

## For More Information

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For more information about Sandhills Publishing products and services, call (800) 331-1978 or visit the Web site at: [www.sandhills.com](http://www.sandhills.com).

sure that we provide them with the added value they need. They have many options when it comes to spending their advertising dollars, so it's important to us to keep them satisfied."

"Microsoft Dynamics CRM is a very valuable tool that we can use to add value for our customers," says Mehring. "And we're going to continue to look at other Microsoft tools to see which others might add value for our customers too."

## 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

- Microsoft Windows Server System
  - Microsoft Windows Server 2003 Enterprise Edition
  - Microsoft Windows Server 2003 Standard Edition
  - Microsoft SQL Server 2005
  - Microsoft Exchange Server 2003

- Microsoft Dynamics
  - Microsoft Dynamics CRM
- Microsoft Office System
  - Microsoft Office Outlook 2007

### Hardware

- IBM BladeCenter servers