



CRM Customer Service Satisfaction - Microsoft Dynamics CRM

These days, customer service means more than good manners reinforced with a smile. Whole new levels of effort and specificity are being demanded of business employees when their customers are involved. Known as customer relationship management (CRM) and one-to-one marketing, *personalization* has become the watchword among businesses large and small across all sectors of the economy.

Back to the basics of CRM

At its core, CRM involves three basic steps: Identifying, learning about, and serving the customer. It's one thing to identify a loyal customer; it's another to cultivate that loyalty. To do this, you have to know your customers. Knowledge is power.

"To win a customer, you've got to know this customer better than any competitor," says CRM guru Martha Rogers, a partner at Marketing 1-to-1, professor at the Fuqua School of Business at Duke University, and member of the Dean's Advisory Council at Indiana University.

The more you know about your customers, Rogers says, the easier it is to ensnare them in *friendly entanglements* that make switching to a competitor much more difficult. Technology makes it possible for these individual entanglements to be institutionalized across the whole of a company.

To be truly effective, Rogers cautions, CRM must become part of the business culture. It cannot simply be installed; it has to be adopted. Sometimes, though, a deeply felt commitment to customers isn't enough.

CRM today relies on technology (that is, personal computers, database management tools, and the Internet) to give marketers greater access to (and knowledge of) their customers than ever before.

Good customer service is more than attitude

Certainly, this is true of [The Orthotic Group](#), based in Markham, Ontario. The company recognized that to continue growing in a highly competitive industry, it had to show tremendous agility and responsiveness to individual customer needs. Yet the company was not well-positioned to capitalize on the renewed obsession with customer service that took hold of the North American marketplace several years ago.

Customer interest was not a problem. The company clearly had a receptive audience for its products as evidenced by the rapid growth it experienced beginning in the late 1990s after management launched an aggressive campaign to expand sales.

The creation of a sales force—previously word of mouth drove sales—and the introduction of new products had the effect the company wanted. Around US\$500,000 at the beginning of the effort, annual sales soared to US\$13.4 million by 2003—a growth rate that secured the company's place in *Profit* magazine's ranking of Canada's 100 fastest-growing companies in both 2003 and 2004.

But, as customer numbers grew, the company was in danger of becoming a victim of its own success. The capability to respond promptly to customer needs was being compromised by a business solution that couldn't handle the new volume of customers.

The proprietary system was unreliable, difficult to support, and prone to frequent crashes. It was heavily reliant on frequent intervention from the IT department to keep sales and accounting from coming to a complete halt. With a growing number of transactions, the system was unable to keep pace and became a bottleneck.

The Orthotic Group and its employees didn't need an attitude transplant to get back on track. It needed a technological boost.

A comprehensive customer service solution

The Orthotic Group found its customer service solution in Microsoft CRM. Available through resellers who are part of the Microsoft Dynamics partner network, Microsoft CRM includes both sales and customer service components. Customer service components give users the capability to:

- Manage and track customer service requests from initial contact through resolution
- Automatically link incoming inquiries to the appropriate customer service request file
- Send requests to a queuing area where they can be accessed directly by teams and individuals
- Automatically route service requests to the appropriate representative for action
- Quickly search a knowledge base that contains solutions to the most common service problems
- Accurately bill for support incidents by creating and managing service contracts
- Keep tabs on customer e-mail messages and generate automatic responses when appropriate
- Generate reports that identify demonstrated service needs and evaluate service performance

The fact that the application is customizable and easily integrated with back-office systems also appealed to The Orthotic Group IT management team. The capacity of Microsoft CRM to store large volumes of customer data and handle high-volume transactions appealed to the group as well. In addition, the adoption of Microsoft CRM enabled the company to standardize Microsoft technologies, streamlining technical processes and services.

Enter Options Software & Consulting Inc., an Ontario-based Microsoft Certified Partner. With its help, both Microsoft CRM and the new back-office system (that is, Microsoft Business Solutions–Great Plains, now Microsoft Dynamics GP) were implemented and data was migrated. The Orthotic Group was up and running on improved systems in about four months—with no downtime during the process. [Read the entire customer story.](#)

Microsoft CRM delivers in key areas

Microsoft Dynamics CRM is an affordable technology solution that helps automate and streamline the three basic steps of CRM: Identifying, learning about, and serving the customer. It provides members across an organization with access to up-to-date information and new ways to respond quickly. The benefits of Microsoft CRM include:

Improved access to customer information

By integrating so easily with the company back-office system, Microsoft CRM provides easy access to vital sales and customer information. Employees can now view and update a wealth of customer data, including contacts; account, sales, and order information; service records; and history. Employees can then share this information across teams and departments. With this data, office staff knows what has been communicated to the customer, understands the precise scope of work to be done, and helps to ensure the company delivers on its promises.

More responsive customer service

With so much more information quickly available to both service workers and salespeople, it's possible to respond more quickly to client concerns than in the past. This boosts both customer satisfaction and, ultimately, employee morale. No longer do employees find themselves conducting hit-or-miss searches for the information they need to satisfy customers. Now such data is easy to locate and to put into the convenient form of a printed report.

Streamlined processes

Microsoft CRM not only centralizes customer sales and service information, it can also be integrated with other business applications. In this way, transactions don't need to be entered, updated, and closed in multiple systems. For The Orthotic Group, this meant managing every customer contact, answering every question without delay, and acting proactively to make it difficult for competitors to keep up.

Enhanced forecasting capability

By building on tools such as Microsoft SQL Server Reporting Services and Microsoft Excel spreadsheet software, a user can analyze and forecast future opportunities in real time. This gives management the ability to spot trends as they develop, leading to more informed decision making.

Connectivity any time, from anywhere

Microsoft CRM enables users to access customer data remotely using a variety of devices, including Windows Mobile-based Pocket PCs and a Web browser or laptop.

Secure customer information

Because it is built on Microsoft SQL Server, Microsoft CRM helps to ensure that data is protected at all times. Information is safe from loss and corruption even if the system goes down unexpectedly. In addition, Microsoft CRM is customizable to accommodate the unique needs of various industries. This means businesses can set up the software to work the way they do instead of having to work around inflexible processes that are often preset in business applications. The bottom line: Microsoft CRM can help your employees get information fast, serve customers more efficiently, and reduce time spent on routine processes. This means employees can spend more time focusing on customers and service.

Top-notch Microsoft CRM at low total cost of ownership

Considering the benefits Microsoft CRM confers upon users, it entails a low total cost of ownership. Mark Miller, president and CEO of Equarius, a Bellevue, Wash.-based firm specializing in professional services systems integration, and a Microsoft Dynamics partner, estimates Microsoft CRM costs his clients 25 percent less than comparable solutions. "We can deliver more value to the customer at a lower cost," Miller says. "We can do more with less."