



## Sales Process Improvement - Sales Success Strategies - Microsoft CRM

What do these four companies have in common?

- A Chilean financial advisory firm
- A Northern California maker of healthcare products
- A New York City producer and distributor of diet food
- A French company that sells and services electronics equipment

Based on markets and locations, they're as different as four companies can be. Despite the differences, these businesses recently shared a common problem: Each company needed to manage customer information more effectively to achieve maximum market share. Ultimately, all succeeded. Here's how.

### 4 companies—4 marketing and sales challenges

Consider the different challenges faced by these four fast-growing companies.

- **Andueza Patrimonios**, a Santiago, Chile-based financial advisory firm, rode the wave of a booming national economy to impressive growth. This same growth compromised the company's capability to manage customer information. Soon, the firm's sales associates found themselves duplicating calls and losing track of information gleaned in previous client visits. What was needed was a full-featured customer relationship management solution that could be integrated easily with existing office systems and workflow—but one that fit the company's modest budget.
- **Conceptus**, a San Carlos, Calif.-based maker of healthcare products, received FDA approval for its flagship Essure product in 2002. Management knew it needed to upgrade the company's CRM capabilities to handle anticipated demand. The top priority was a centralized database of customer information accessible to workers in-house as well as in the field. Armed with PDAs and Pocket PCs, the company needed a means of measuring the impact of physician training on sales.
- **Zone Cuisine**, a New York City business launched in 2003, prepares and distributes (at a regional level) meals that comply with the popular Zone Diet. The company needed a software system that facilitated effective communications with customers, prospects, and the workers who prepared and delivered the food. The solution had to be scalable (that is, expandable to other companies and locations as the company business grew) and easily and inexpensively customizable. Compatibility with the company's Seibel-based call-management system was another priority.
- **Atalys**, a French company that sells and services electronic equipment, realized that to better serve

clients, its on-site technicians and marketing staff needed access to a comprehensive database of customer information. A similar system also was needed for headquarters-based planners to take full advantage of the information collected in the field. The company decided to focus on a hosted CRM solution—one that was compatible with its other software systems, could be installed in several languages to satisfy the demands of users outside France, and could keep pace with Atalys' anticipated growth.

## **Gaining total control of sales process with one solution**

The four businesses shared more than sales challenges. They also shared a solution. In the end, they all turned for assistance to Microsoft Dynamics CRM, a full-featured customer relationship management application designed to give users the marketing edge demanded by today's competitive marketplace. An added benefit is the solution's low cost of ownership. Microsoft CRM refers to the emphasis on individual consumers and their unique needs. By delivering highly personalized service, it's easier for a business to engender customer loyalty. Of course, identifying good customers and winning their loyalty are just two steps in the overall marketing process. The most important step is the final one—closing the deal and making the sale. Microsoft CRM prevents marketing errors by promoting shorter sales cycles, higher close rates, and improved customer retention.

### **3 areas critical to sales success**

The solution each of the companies turned to helps users succeed in three areas that are critical to sales success.

#### **Monitoring and managing the entire sales process**

- **Account management.** View past and current account activity, including contact information, communications, open quotes, pending orders, invoices, credit limits, and payment history.
- **Lead tracking and routing.** Track prospective customers and then convert them into qualified leads, which are automatically routed to the correct salespeople or teams for follow-up.
- **Opportunity management.** Capture important sales information to uncover new business opportunity. Use Microsoft Dynamics sales pipeline analysis reports to create precise sales forecasts.
- **Customer communications.** Use e-mail templates to communicate with targeted prospects and customers. Create print materials, and then send to prospects via Microsoft Office Word Mail Merge.
- **Quote generation.** Create quotes and track their conversion to orders. Modify and save orders until they are ready for submission.

#### **Sales team management**

- **Sales quotas.** Measure employee sales performance against goals. As opportunities are closed in Microsoft CRM, they are credited against the assigned quota.
- **Territory management.** Create territories for salespeople and enable them to manage and evaluate territory-based sales processes with workflow rules and reports.

#### **Accessing decision-driven information**

- **Competitor tracking.** Maintain detailed information about competitors and track competitor activity by product, region, or other criteria.
- **Reports.** View, sort, and filter a wide range of reports to identify trends, measure and forecast sales activity, track sales processes, and evaluate business performance.

### **Success stories show the impact of Microsoft CRM**

To gauge how effective Microsoft CRM is at dealing with disparate sales-related problems in the real world, let's visit the four companies mentioned above:

- **Andueza Patrimonios**, working with Microsoft Partner C-Metrix, eventually settled on a customized version of Microsoft CRM—called CRM Express—that put customer information in a centralized location accessible to everyone in the company. Because of its similarity to the Microsoft Windows operating system, the solution is easy to learn and integrate into the company's other systems and workflow. As sales personnel are added, says company general manager Rodrigo Andueza Saint, "They can easily adapt to our CRM workflow and become productive almost immediately."
- **Conceptus** chose Microsoft CRM because of the program's relatively low cost of ownership and the ease with which it could be integrated with other Microsoft systems. When Conceptus rolled out the program in mid-2003, assisted by Microsoft partner ISS Group, benefits quickly became apparent. Suddenly, all staffers had a complete view of customer data, including the PDA-toting field workers who no longer had to carry laptops or "call the office and wait for someone to look up the information," says Jeff Letasse, Conceptus senior director of IT. The solution also makes it easy to gauge the effect of physician training on sales.
- **Zone Cuisine** selected Microsoft CRM for its ease of customization, low cost, and ability to integrate with the company's Seibel-based, call-management system. It took just four months for Microsoft partner Catapult Systems to develop a tailored solution that gave the Zone Cuisine staff a single, consistent view of customers, while extending the functionality of Microsoft CRM to manage billing, delivery scheduling, and other business functions. The resulting productivity boost "has allowed us to take on more customers without growing our customer support staff," says Meredith Burkus, executive sales representative for Zone Cuisine.
- **Atalys** chose Microsoft CRM in the hosted mode, with Microsoft partner Titanium serving as application service provider. This meant there was no software or hardware to be installed in-house and the application was available almost immediately. Now Atalys marketing reps and technicians have 24-hour, everyday access to an entire database of customer information. "Not having to change the working environment of marketing reps because a Microsoft CRM interface was available in Outlook was a decisive factor for adopting the project," says Atalys manager Yannick Schneider.

### **An affordable, flexible CRM solution**

Microsoft CRM derives its value from more than its specific functions. As illustrated by the cases above, the program can be integrated with other back-office solutions, including ones from Microsoft Dynamics, and adapted to meet a company's unique needs.

The solution can be accessed online or offline using Microsoft Office Outlook messaging and collaboration client. Microsoft CRM contacts, appointments, tasks, and e-mail capabilities are integrated with Microsoft Outlook.

Considering the benefits it confers upon users, Microsoft CRM entails a low cost of ownership.