



Consumer Products Company Utilizes SMBology's Technical Aptitude to Garner Efficient CRM Solution

SMBology's client is a manufacturer and distributor of tobacco products.

To support the company's aggressive growth and product sales goals, the firm required an IT development partner to expertly tackle issues relating to the company's sales force automation system.

After assessing the firm's business structure and sales process, SMBology leveraged the client's existing Microsoft Dynamics CRM (MS CRM) platform to provide offline data availability and synchronization capabilities. Moreover, a custom application and user interface for the company's CRM was developed to better assist the sales process.

Results

- ▣ Provided access to account data despite secure location
- ▣ Improved data management and reporting practices
- ▣ Increased sales team productivity
- ▣ Reduced burden of account reassignment
- ▣ Obtained 100% solution adoption rate

Technologies Used

- ▣ Microsoft Dynamics CRM w/ SFO
- ▣ Microsoft SQL Server 2005
- ▣ Microsoft .NET (C#) 3.0 (client) 3.5 (server)
- ▣ SQL Server Integration Services 2005
- ▣ SQL Server Reporting Services 2005
- ▣ Javascript / d/HTML
- ▣ XML
- ▣ AJAX
- ▣ SOA - Web services w/ SOAP
- ▣ T/SQL /Stored Procedures

Company Overview

SMBology's client is a manufacturer and distributor of tobacco products. Founded in 1982, the firm has experienced substantial marketplace growth and in 2002, became an independent operating unit of a notable consumer products corporation.

Business Challenge

In 2007, SMBology's client experienced a rapid and significant increase in its sales force. At this time, the company realized that its legacy home-grown sales automation and customer relationship management (CRM) solution was both inflexible and unable to scale, leaving its expanded marketing team unable to work efficiently and effectively. As such, the firm needed an efficient, customized solution to help manage its accounts and sales processes.

Specifically, the sales/CRM solution needed to function both online and offline, as the company's sales team members were constantly on the road visiting accounts in locations with no Internet connectivity and unreliable cellular network reception. The firm required a solution that would allow users to sync their local laptops with the company's headquarters each morning before visiting clients to ensure they had the most up-to-date client account information. Moreover, users needed to access and record detailed account information during their client visits in a disconnected (offline) state as well as have the ability to sync the recorded client data back to headquarters at the end of each day. Additionally, to increase efficiency and achieve greater sales force buy-in, users needed to be able to record client observations and retrieve account data without having to navigate through multiple screens.

To develop the sales force automation system that was needed to support its aggressive growth goals, the firm engaged SMBology to serve as its IT development partner, utilizing SMBology's expertise to develop a reliable and efficient solution for the company's expanding team.

SMBology Solution

SMBology's client had identified Microsoft Dynamics CRM (MS CRM) as its solution of choice, contracting with another company to install this platform prior to the firm's engagement with SMBology. The initial implementation was not effectively customized for the firm's needs, resulting in an insufficient tool that was difficult to use and unstable at times. Despite its poor implementation, the firm believed in the Dynamics CRM platform and realized the need for an IT development partner that could tailor MS CRM to its unique business processes. SMBology's analysis confirmed that MS CRM was the right tool for the job, providing a robust and powerful framework for enhancing the company's sales automation process.

Security rules only need to be set once, as they are automatically implemented across all CRM interfaces.

SMBology leveraged the powerful and flexible foundation of MS CRM to customize its look and feel along with its workflow. A custom user interface was developed to make data delivery and data entry more efficient for the company's mobile sales force.

A key step was creating quick, high-value wins. To address the firm's offline data availability requirement, SMBology leveraged the organization's existing implementation of the MS CRM Sales For Outlook (SFO) plug-in. The SFO module integrates seamlessly with Outlook, leveraging a local database server (SQL Server Express) and Web Server (IIS) to provide access to data when Internet connectivity is not available, yet still benefiting from MS CRM's built-in security. Configurable rules determine what data to synchronize to the offline database, enabling each user to only carry the data relevant to their geographic area and sales function. This is essential, as the firm's CRM currently contains over 2 million records.

In addition to providing data offline, the SFO plug-in allows data synchronization to occur via any stable Internet connection after the user logs in to the corporate VPN (for security purposes). Built into the MS CRM and SFO client, this synchronization feature eliminates the need to install or configure tools to copy data from one source to another. Moreover, the SFO plug-in determines whether a data request should be sent directly to either the online server or to the local database (when offline), allowing users to leverage the processing power of the central server when connected to the Internet and VPN, while not preventing their access to data when away from a reliable connection.

Company security concerns were addressed using the solid framework for user-configurable security provided by MS CRM. This security feature allows SMBology's client to finely control who can read and/or edit company information. Furthermore, data security is implemented across the entire MS CRM installation with a single set of rules driving access for viewing, reporting, editing, and exporting data. Security rules only need to be set once, as they are automatically implemented across all CRM interfaces.

To further enhance the firm's effectiveness, SMBology leveraged the powerful and flexible foundation of MS CRM to customize its look and feel along with its workflow. A custom user interface was developed to make data delivery and data entry more efficient for the company's mobile sales force. This "Account Call Interface" (ACI) was built using custom C# .NET web forms and MS CRM's web service API. The custom interface (running as a separate Web application) pulls data from several locations within the firm's CRM to display important account information in one central location. Designed to match the flow of the company's defined sales process, the ACI aggregates all information relating to a particular client and displays this to the end-user via the historical summary screen. Additionally, this interface allows the sales team to efficiently input/record current sales information in real-time using the call details screen when making onsite client visits.

MS CRM's out-of-the-box functionality allowed SMBology to creatively address other challenges as well. Another core feature of the company's ACI is a custom business rules engine designed to immediately highlight sales opportunities to the sales force. These sales opportunities are identified by the business rules engine through comparing real time data gathered at the client site with existing data in the firm's CRM (also synchronized offline). The challenge: keeping the dynamic business rules (which can be tweaked daily) in sync between the office and field. SMBology leveraged the SFO plug-in to handle the business rule synchronization, a creative use for a plug-in traditionally used only to synchronize account information. Furthering this concept, SMBology also used the SFO plug-in to synchronize Web configuration files for the offline sales application, allowing headquarters to easily push configuration updates to remote users.

SMBology was able to leverage the organization's existing MS CRM installation along with MS CRM's framework and out-of-the-box functionalities in order to provide a customized application satisfying the firm's organizational and sales force needs while significantly decreasing development time and cost.

ACI's single point of data entry dramatically improves ease of use, ultimately driving complete adoption by the firm's sales force and greatly aiding their efforts to increase sales of the company products.

To address the firm's need to perform bulk reconciliation of account assignments, SMBology augmented MS CRM's existing functionality. Out-of-the-box, MS CRM is geared towards manual reassignment of contacts, a daunting proposition when faced with more than 400,000 accounts with over 2 million call details. As such, SMBology developed an application to run alongside MS CRM called the Assignment and Sharing Engine. Instead of manually reassigning all data records to a new salesperson (with each person responsible for approximately 750 accounts), the Assignment and Sharing Engine stores user-defined ownership rules, verifying them against the company's CRM interface after business hours. All necessary account information is then reassigned to the newly defined account owner before the next business day. Moreover, this engine is completely integrated and accessible through the firm's custom ACI.

Results

Instead of architecting a sales force solution from scratch, SMBology was able to leverage the organization's existing MS CRM installation along with MS CRM's framework and out-of-the-box functionalities in order to provide a customized application satisfying the firm's organizational and sales force needs while significantly decreasing development time and cost.

Utilizing MS CRM offline synchronization capabilities, the company's sales team is able to retrieve and record crucial account information regardless of their current location, promoting better data management and reporting practices in addition to supporting the sales team in their sales efforts. Configurable data rules reduce the need to copy all data offline, as only data relevant to the user is stored, thereby reducing the size of the offline database and necessary storage space.

Additionally, sales data is seamlessly integrated via the implementation of the firm's ACI, ultimately reducing workflow inefficiencies while reinforcing established sales processes. ACI's single point of data entry dramatically improves ease of use, ultimately driving complete adoption by the firm's sales force and greatly aiding their efforts to increase sales of the company products.

Running parallel to MS CRM, the firm's Assignment and Sharing Engine essentially eliminates the need to manually transfer account data and decreases the complexity/burden of reassigning the ownership of sales territories/accounts to other team members.

Combining MS CRM with core Microsoft .NET and SQL technologies, flexibility is maintained as these programs/services have the ability to integrate with third party applications. As such, this solution is well equipped to support the organization's future growth and business processes.

SMBology Inc. is a growth-oriented IT firm offering strategic consulting, user experience design, application development, and infrastructure services. Clients benefit from our focus on easy-to-use technology, a deep understanding of the human user, and keen business acumen. This focus, paired with our deep technical expertise and broad service offering, enables us to take your company further than you ever imagined.

