



Professional Services Company Improves Its Customer Service and Reduces Call Volume

Microsoft Corporation



Microsoft Dynamics Customer Solution Case Study



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Overview

Country or Region: United States

Industry: Professional Services

Customer Profile

CROSSMARK is a professional services company that helps consumer goods manufacturers and retailers with headquarter selling, retail merchandising, store level marketing, and trade practices.

Business Situation

CROSSMARK management needed a customer relationship management system capable of streamlining processes, improving employee productivity, reducing call volume, and enhancing reporting capabilities.

Solution

With support from Microsoft® Gold Certified Partner Tribridge, CROSSMARK implemented Microsoft Dynamics™ CRM and achieved significant improvements in several business processes.

Benefits

- Provide better customer service
- Resolve recurring issues
- Decrease call volume
- Enhance staff efficiency

“Microsoft Dynamics CRM helps us pinpoint why people have to make phone calls and helps us systematically reduce the time spent on non-value-added activities.”

David Peet, Vice President of Field Support Services, CROSSMARK

CROSSMARK is a professional services company that helps facilitate sales and resolve service issues between consumer goods manufacturers and their retailers. CROSSMARK's customer service tracking system, composed of isolated notes in a proprietary event-logging application, served only the most basic needs of the customer service representatives. Employees could access the specific customer information within the account file, but they could not view collective information or recurring issues across all accounts. With help from Microsoft® Gold Certified Partner Tribridge, CROSSMARK implemented Microsoft Dynamics™ CRM to improve reporting and gain a clearer picture of service issues. With this information, CROSSMARK was able to provide better customer service, proactively resolve recurring issues, decrease call volume, and enhance staff efficiency.



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David Peet, Vice President of Field Support Services, CROSSMARK

Situation

CROSSMARK helps consumer goods manufacturers and retailers with headquarter selling, retail merchandising, store level marketing, and trade practices. With more than 100 years in business and headquarters in Plano, Texas, the company operates in the United States, Canada, Australia, and New Zealand. CROSSMARK is not a call center by trade, but by necessity. The primary purpose of the company is to enhance sales and resolve service issues for manufacturers and the retailers who sell their products.

CROSSMARK's pricing structure does not vary depending on call volume. Whether representatives take 100 calls per month or 1,000 calls per month, the revenue on the account is the same. Therefore, reducing the call volume increases profitability.

“Our call center supports our internal people, who perform the work out in the field on behalf of our clients,” says David Peet, Vice President of Field Support Services for CROSSMARK. “Even though we factor in a piece of the costing for call center, recruiting, and support work, there's a threshold that, once crossed, negatively impacts profitability.”

Peet is always searching for ways to improve efficiency and profitability while providing excellent customer service to his company's clients. He knew that if he could see a summary of customer service issues and reported product complaints, he could help his customer service representatives be more prepared for such calls and inform clients of persistent mistakes in the ordering process that impact their bottom line.

Solution

The CROSSMARK team evaluated three customer relationship management (CRM) solutions before choosing Microsoft Dynamics™ CRM—a solution that provides the

tools and capabilities needed to create and easily maintain a clear picture of customers. Because CROSSMARK uses Web applications based on Microsoft® technologies, as well as the 2003 Microsoft Office System and Microsoft SQL Server™ 2005, Microsoft Dynamics CRM was the easiest to build and integrate into the company's existing technology structure.

While all three proposed CRM solutions met the business requirements set by CROSSMARK management, the IT group recommended Microsoft Dynamics CRM. Peet says, “The core reason the IT group wanted Microsoft Dynamics CRM was that, in addition to meeting the business requirements, Microsoft Dynamics CRM would allow us to build on our existing investment in the Microsoft platform, rather than adapting the infrastructure to accommodate one of the alternate solutions. Our IT staff already had a solid knowledge base in supporting Microsoft infrastructure, so we expect costs of ongoing support and maintenance to be much less than the other options. It was just a bonus that Microsoft Dynamics CRM was more affordable than the other two solutions.”

Microsoft Dynamics CRM helped CROSSMARK reduce costs immediately by minimizing the time and expertise needed to implement the application and by negating the need for superfluous hardware or software. For this implementation, CROSSMARK only needed to purchase Microsoft Dynamics CRM and a separate instance of SQL Server 2005.

Explains Peet, “We wanted to find a system that is familiar to users and that we can support internally. We didn't want to adopt a whole new database platform and hire a whole new team with different technical and infrastructure skills. We wanted to find something easy to use and easy to support,

so deployment and maintenance wouldn't be a cost burden." With support from Microsoft Gold Certified Partner Tribridge, CROSSMARK implemented Microsoft Dynamics CRM.

Staggered Deployment

When it came to rolling out Microsoft Dynamics CRM to employees, CROSSMARK took a unique approach to minimize risk and help set the stage for broad adoption. Peet wanted to deploy the solution conservatively, because the event-logging system that Microsoft Dynamics CRM replaced was a mission-critical application. Further, deploying the solution incrementally to customer service representatives first would help CROSSMARK identify any training requirements related to the new software before adding the next group of users. This incremental approach helps ensure broad adoption by establishing traction with each department before the next was added.

For the first phase of the roll out, CROSSMARK deployed Microsoft Dynamics CRM to the call centers as a way to track and manage service tickets. A pre-production site was constructed for five customer service representatives to use and note for any necessary training needs. After three weeks, the site was expanded to serve 10 additional representatives per week for six weeks. Roughly two months into the implementation, the entire team of 60 internal customer service representatives was using Microsoft Dynamics CRM.

The CROSSMARK IT team was soon confident enough to expedite the process by bringing the 30-person field services group on board. Once that was accomplished, the 40-person technology group was welcomed into the fold. Currently, about 130 CROSSMARK employees are successfully using Microsoft Dynamics CRM. In 2008, the sales staff members will begin using it to gain deeper

insight into their customers' needs and trends.

"By using the call center as our initial foray into Microsoft Dynamics CRM, we're building a database of every customer we contact—who they are, what kind of problems they experience, and what our speed to resolution is for those customers," says Peet. "Our objective for 2008 is to introduce Microsoft Dynamics CRM to our sales people to provide a 360-degree view of each one of their key clients. The sales team will want to use Microsoft Dynamics CRM because it will provide insight about the people they're trying to sell to."

When the sales staff is granted access to the customer service and trending data in 2008, Peet anticipates little resistance. "They'll want to have access to that valuable information," he says.

Easy Customizations

Microsoft Dynamics CRM offers basic customizations that can be created without the need to write code or use third-party applications. For CROSSMARK, the basic customizations available out-of-the-box met all of the company's requirements. More intricate, complex customizations that would require programming simply weren't needed.

Remarkable Reporting Capabilities

The reporting capabilities of Microsoft Dynamics CRM are the most enticing aspect of the implementation. Gaining insight into why calls come in, which problems are reported, and at what frequency are key to reducing call volume, improving customer service, and increasing efficiency. Microsoft SQL Server 2005 Reporting Services ensures deeper, faster, customized results.

Getting information out of Microsoft Dynamics CRM is just as easy as putting it in. Data can be exported to Microsoft Office

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David Peet, Vice President of Field Support Services, CROSSMARK

Excel® 2003 and reports can be generated with one click using Microsoft SQL Server 2005 Reporting Services, which offers powerful reporting and analysis tools that make it easy to identify opportunities and problems at a glance. Microsoft Office Excel 2003 spreadsheets and PivotTables® with Microsoft SQL Server 2005 Reporting Services allow Peet to analyze relevant business data. Peet notes, “We’re able to retrieve a lot of information from the PivotTables offered through the SQL Server 2005 Reporting Services database.”

High Adoption Through Ease of Use

Microsoft Dynamics CRM promotes widespread adoption among employees because it is easy to learn. For CROSSMARK employees who already use Microsoft Office Outlook 2003, Microsoft Dynamics CRM provides a familiar user interface that can be used without ever leaving Outlook 2003. Because it was designed to partner with other Microsoft products, Microsoft Dynamics CRM delivers lower training costs, broader user adoption, less application switching, higher productivity, and a fast return on investment.

According to Peet, the familiar user interface made learning Microsoft Dynamics CRM easier than if the company had started with something completely alien. Adoption was high—well over half the employees introduced to Microsoft Dynamics CRM liked it and claimed that the solution simplified their job, which was a relief to the Vice President of Field Support Services. “As for resistance to Microsoft Dynamics CRM, I was pleased with how little I had,” recalls Peet.

Supportive Microsoft Partner

Tribridge provided support for CROSSMARK’s IT team and trained them on how to set up cases, rename fields, and carry out any additional basic set-up processes. This not only helped with the deployment, but

prepared the internal IT team to make additional changes in the future.

The CROSSMARK IT team spent a lot of time learning how to make future customizations by watching Tribridge handle the originals. Peet says, “The biggest contribution from Tribridge was that they gave us a good kick start. They got us off the ground much more quickly than if we would have tried it on our own. The second benefit was Tribridge’s expertise in training our people how to go forward after their exit. Although we don’t have the same skill level as a Microsoft Dynamics CRM partner, Tribridge taught us enough to know what we’re doing and to do it with speed and reliability.”

Benefits

In less than six months, CROSSMARK is already reaping benefits from the implementation of Microsoft Dynamics CRM. The reporting capabilities made possible by the solution and enhanced by Microsoft SQL Server 2005 Reporting Services unveil a valuable summary of customer service information to the CROSSMARK team. This collective view of data helps customer service supervisors identify common issues and better prepare representatives to proactively resolve those issues, consequently resulting in a lower call volume. Further, CROSSMARK shares this insight with clients to help improve their bottom lines as well. Altogether, this familiar, easy-to-learn application makes everyone’s jobs easier—from the IT team to management to customer service.

Provide Better Customer Service

With the reporting capabilities in Microsoft Dynamics CRM, the customer service team can better prepare for future calls based on information from past calls. For example, with the old system, all of the call information was isolated with no trending or reporting available. But with Microsoft Dynamics CRM, supervisors can identify frequently asked

questions and commonly reported issues, predetermine the appropriate responses, and train representatives to handle the calls effectively. This method, as opposed to impromptu responses, results in better customer service.

Resolve Recurring Issues

Manufacturers and retailers suffering the same, frequent obstacles can be eased with one call from CROSSMARK identifying the issue. For instance, if a retailer consistently places orders that exceed the weight limit, resulting in a number of calls to customer service, it may be because the retailer's purchasing department is unaware of the issue. With one courteous call from CROSSMARK, the retailer can amend future orders to fit within the weight limit. This not only saves time and money for CROSSMARK, but also helps the retailer who no longer needs to duplicate efforts or pay additional shipping fees.

CROSSMARK supports more than 1,800 food manufacturers and sells to roughly 3,000 core retailers. Each one of those relationships has its own business rules and nuances. Peet says, "Microsoft Dynamics CRM allows us to evaluate the cases that come in, share that insight with our business partners, and help drive their supply chain costs down."

Decrease Call Volume

Reducing call volume is essential to CROSSMARK's bottom line. Says Peet, "There will always be phone calls, but I have a responsibility to resolve the issues related to those calls as efficiently as possible and to keep them from recurring."

He continues, "Microsoft Dynamics CRM helps us pinpoint why people have to make phone calls and helps us systematically reduce the time spent on non-value-added activities." Although it's too soon after deployment to determine the exact

percentage of call volume reduction, Peet noted that he can definitely see the call volume dwindling since CROSSMARK's implementation of Microsoft Dynamics CRM.

Enhance Staff Efficiency

According to Peet, although changes in systems or processes can be met with resistance, "More than half of the customer service representatives say that using Microsoft Dynamics CRM makes their jobs easier." Peet was pleasantly surprised by this, considering the primary purpose for the implementation of Microsoft Dynamics CRM was for its reporting capabilities. This improved efficiency allows representatives to better serve callers with faster access to the information they need. And because the staff already knew Microsoft Office Outlook 2003, the familiar user interface expedited training and acceptance.

For More Information

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For more information about CROSSMARK products and services, call (469) 814-1000 or visit the Web site at: www.crossmark.com

For more information about Tribridge products and services, call (877) 744-1360 or visit the Web site at: www.tribridge.com

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

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About Tribridge

Tribridge is an IT services firm that delivers and supports technology, business management and core infrastructure solutions for organizations spanning diverse industries. Tribridge helps customers strategically leverage IT investments to become more productive, profitable, competitive and secure through proven methodologies, process optimization and industry best practices. We are dedicated to building a community in which organizations derive long-term business value from practical solutions that guarantee customer success and maximum return on investment. Headquartered in Tampa, Tribridge has customers, offices and team members across the U.S. and is the recipient of numerous awards, including the 2008 Microsoft Dynamics Worldwide Partner of the Year.

Contact Tribridge

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