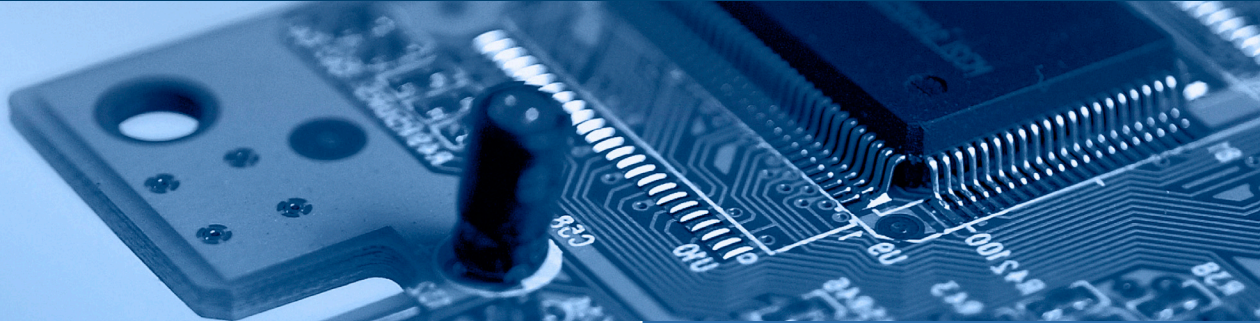




Case Study: JADAK Technologies



Tribridge Migrates JADAK from Salesforce.com to Microsoft Dynamics CRM® in Less Than Three Months

BUSINESS SITUATION

In 2006, JADAK selected Salesforce.com to manage its growing database full of customer details. "We initially selected Salesforce.com because it was easy to get started, we could configure the fields our business required and we liked that it operated in a hosted environment," said Chris Daly, JADAK's CFO. By 2009, it became necessary to replace the entry-level version of Salesforce.com with a solution that was more robust and had greater integration capabilities, a lower cost of ownership and the same familiar interface of Microsoft Outlook, which improved and simplified user adoption.

JADAK's sister company had great success implementing Microsoft Dynamics GP with Tribridge. Therefore, Chris, who serves as CFO for both companies, turned to their trusted Microsoft partner again for a recommendation. "We are a Microsoft-centric company. We knew about Microsoft Dynamics CRM and were pleased that Tribridge could help us implement the solution in a very short timeframe," said Chris. "We had to be completely off Salesforce.com within three months or we would have to pay a full year's licensing fee."

SOLUTION

Through their due diligence, it became apparent that moving to Microsoft Dynamics CRM would have other advantages. "We had grown and matured as a company," said Chris. "We were ready to fine tune and streamline the sales, marketing and customer service facets of our business and saw that Microsoft Dynamics CRM was the platform that would enable this. Additionally, integrating with our internal manufacturing system would now be a reality since Microsoft Dynamics CRM is SQL-server based and offers a flexible tool set for integration to any platform."

The final piece was the comfort and trust JADAK had with their local Microsoft partner, Tribridge. "We trust the people at Tribridge. We knew that they would be there for us and help us meet our deadline," said Chris.

JADAK utilized Tribridge's *QuickStart* Implementation Solution, an expedited go-live strategy, which features software and hardware, data transfer from the legacy system, report creation and query tools.

SOLUTION: Microsoft Dynamics® CRM



ABOUT JADAK

Headquartered in Syracuse, NY, and founded in 1996, JADAK is a multi-faceted engineer-to-order organization that primarily works with OEM medical device manufacturers in the healthcare and life sciences industries. The company's goal is to provide unparalleled solutions and support by offering customers a full set of services and products. Specializing in data collection and communications technologies, JADAK's solutions are either integrated into medical devices or designed and manufactured specifically for the customer.

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We help our customers become more productive, profitable, competitive and secure.



RESULTS

A phased implementation plan was put into place. "Our initial focus was to have all customer-facing employees using Microsoft Dynamics CRM," said Chris. This included sales staff and engineers who work on managing customer projects. Moving the data from Salesforce.com to Microsoft Dynamics CRM was simplified by Scribe, a tool recommended by Tribridge. "We had customer data, including history and attachments, to migrate over the course of a weekend," said Chris. "Scribe worked fantastic. It made our lives a lot easier and our go-live date attainable."

JADAK, with help from Tribridge, is moving on to subsequent phases where workflow and integrations between JADAK's manufacturing system and Microsoft Dynamics CRM will be created. "We wanted our sales team to have complete visibility into all customer interaction points," said Chris. "There is a significant amount of customer data, such as shipping and on-order details, that resides in the manufacturing system. After the integration has been completed, our sales team will only have to access one system for a complete view of their customers. This also eliminates the need to have someone rekey data between the two systems, which is the equivalent of a part-time employee. Our customers benefit from the quicker response." Employees launch Microsoft Dynamics CRM from within Outlook and can even access remotely via Outlook with a VPN connection. This affords JADAK a more elegant, streamlined solution.

JADAK's implementation was completed ahead of schedule, which saved the company thousands of dollars. Additionally, JADAK was able to move forward sooner than expected on other project phases, such as defining business process workflow, which was slated for the latter part of the year. "We follow a distinct set of sales and engineering processes in order to move a project to the point of being revenue producing. Capturing and automating these steps has streamlined our workflow," said Chris. "We are saving a lot of hours by having all communications in one, centralized system that everyone uses."

JADAK's sales team now operates more efficiently. "We are able to easily convert quotes in Microsoft Dynamics CRM to opportunities with a lot of detail and with great ease," said Sandy Voegelé, sales coordinator. "We went from having to rekey a lot of data and keystroke errors to none. I also like the ability to move and rename fields myself. We see so much potential for business process automation with Microsoft Dynamics CRM and how it can make our jobs easier and our team more productive."

FUTURE PLANS

JADAK has future plans for the marketing team to use Microsoft Dynamics CRM to create meaningful marketing messages and campaigns. "We plan to add up to 10 more users in the next year," said Chris. "We also plan on using the service functionality of Microsoft Dynamics CRM and integrate it with the manufacturing system in order to track RMAs, further capturing all customer contact."

"Our team is excited about the possibilities with Microsoft Dynamics CRM," said Chris. "They come up with new ideas of how we can use the system, and then we engage Tribridge to talk through how we would implement them. We love the intuitive nature of Microsoft Dynamics CRM and appreciate the greater flexibility and integration than we had before. We have tremendous functionality with a lower annual investment."

"I have been through a lot of implementations in my career and this was among the best," said Chris. "Tribridge's team did an outstanding job. They kept us focused on completing tasks on time to ensure we would meet our timeline. The project manager helped us understand what was achievable. We are confident in Tribridge's ability to help us sustain our success."

SOLUTION: Microsoft Dynamics® CRM

THE RESULTS

- › Complete visibility into all customer interaction points
- › Integration between manufacturing system and customer data
- › Elimination of data rekey between two systems
- › Ability to remotely access Dynamics CRM
- › Thousands of dollars saved by completion ahead of schedule
- › Several hours saved by accessing all communications in one system
- › Easy conversion of quotes to opportunities
- › Increased business process automation
- › Lower cost of ownership

CONTACT TRIBRIDGE

Find out how Tribridge can help you simplify your business.

CALL: (877) 744-1360

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