

Microsoft Dynamics CRM enhances Sales Productivity and Management Information

Background

Jungle IT Limited was founded in 2004 by Dave Smith and Jonathan Asquith, with the sole purpose of supplying IT Hardware and software to the highest service levels.

Jungle IT Limited wanted a system that would allow it to seamlessly keep track of any incoming and outgoing transactions, as well as being able to build on great customer service and support its sales team. As a growing business it needed a system that would grow with them every step of the way.

Jungle IT Limited chose Dynamics CRM due to its flexibility and turned to Caltech CRM, Dynamics CRM specialists to help them generate the benefits from the system.

The Solution

Microsoft Dynamics CRM

Microsoft Dynamics CRM has proved an excellent way to help Jungle IT Limited to maintain regular contact with its customers. Bryoni McDade, marketing executive confirms “Using the integration with Microsoft Outlook, tasks can easily be set to keep regular contact with our clients through CRM.”

McDade confirms, “As a growing business, Dynamics CRM has helped us support and develop new starters. We can identify any training needs to ensure we support our teams to grow and develop, whilst delivering consistent and excellent service to our customers.”

Caltech CRM helped Jungle IT Limited to integrate Dynamics CRM with QuoteWerks. McDade continues, “This has helped us get quotes out quickly, and make certain that we can look after our customers by ensuring our representatives have the highest knowledge about the products we are quoting.”

Significant Benefits

Jungle IT Limited love the flexibility of the “advanced finds”, as well as the ability to help to track performance of mailshots and assist account management and customer experience.

MailChimp email marketing solution has also been integrated to Dynamics CRM using *The PowerObjects’ PowerPack Add-On, PowerMailChimp*. McDade says “The PowerMailChimp integration has made my life in marketing so much easier. I can easily find the right clients and send information that they want and need, without having to import contacts.”

Dave Smith, Director confirms, “The ability to modify and customize Dynamics CRM is a huge benefit for us; we run various workflows and reports on our system to enable us to get the information we need, when we need it. It also ensures we can keep our data up to date and we know who is a lead, a prospect and a customer. Dynamics CRM gives me the management information I need at my fingertips.”

Jungle IT Limited has also taken the opportunity to integrate Dynamics CRM to their phone system which has realised direct dialling from the database contacts, incoming caller notification and screen pop of incoming calls contact records.

McDade concludes, “Caltech CRM really understands our business. They have helped to customise the system to meet our needs and always seek to find the best solutions for any issues we come across. Dynamics CRM has improved the productivity of our sales team, improving the quality of calls made, the training provided and the management information gathered.”

