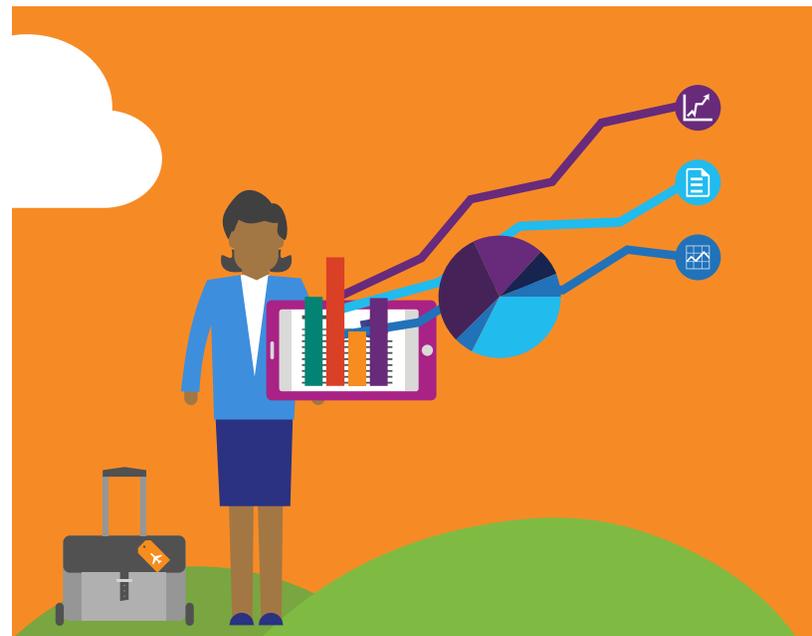
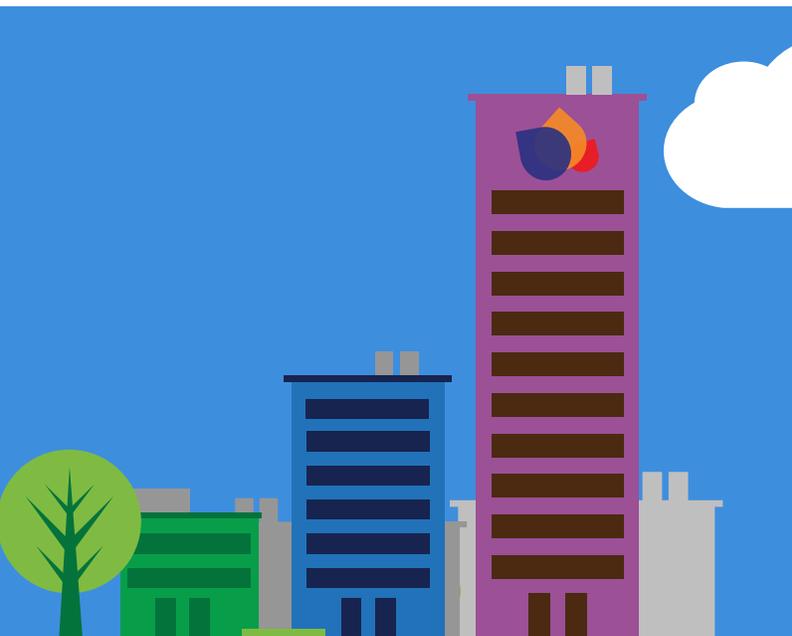
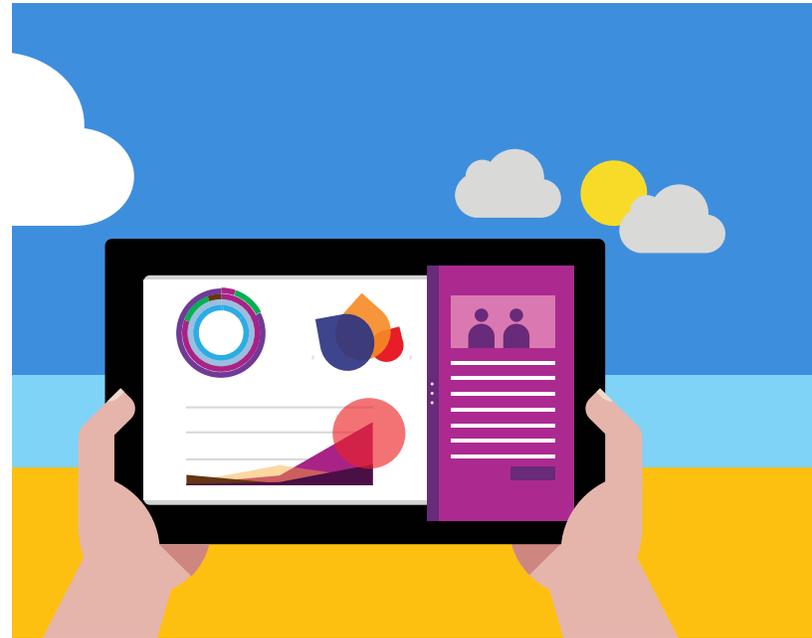
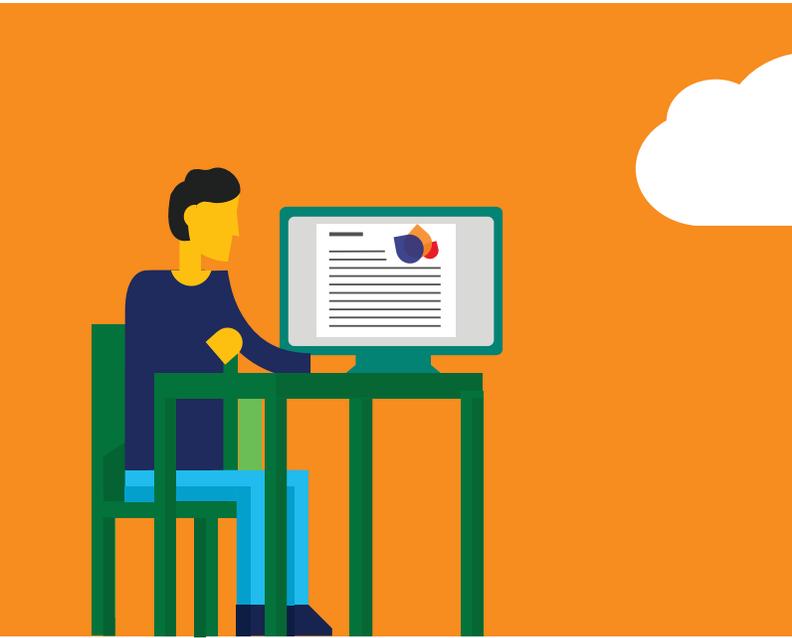


# 17

amazing customer experiences  
businesses deliver **TODAY** with  
Microsoft Dynamics CRM Online



## 17 amazing customer experiences businesses deliver today with Microsoft Dynamics CRM Online

To make an impact on customers today—building loyalty in the face of competition that is only a click away—takes more than “good enough.” The organizations that are winning hearts and minds are delivering amazing customer experiences that are personalized, proactive, and predictive across marketing, sales, and service.

### Amazing service is within reach of every small and midsize business organization

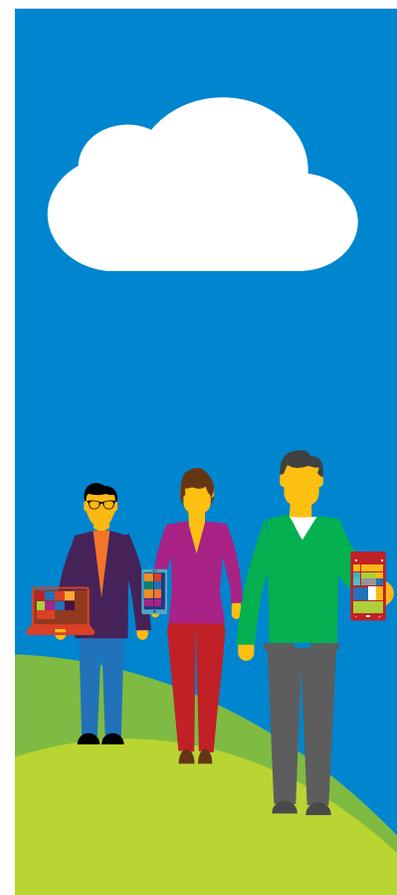
Until recently, it was challenging for small and mid-size organizations to afford and support the software and data management that builds amazing customer experiences. That has all changed.

With Microsoft, you have a unique opportunity to use familiar tools to know your customers and serve them better—earning their loyalty every single day. With solutions built on Microsoft products and technologies, you can:

- Make sure everyone on your sales and service teams has a complete, consistent view of your customers.
- Find and capitalize on the best opportunities to keep your sales teams focused on the greatest potential.
- Personalize customer experiences by creating end-to-end, outcome-focused journeys that engage at the right time and place.

To help you envision your own potential, we asked Microsoft partners to share stories from organizations that are tapping into the power of Microsoft Dynamics CRM Online and Microsoft’s suite of cloud solutions. These examples will show you how real businesses are changing their customers’ experiences for the better.

As you read about these forward-thinking organizations, you’ll undoubtedly be inspired. Let’s see how Microsoft Dynamics CRM Online can help you amaze your customers.



# Table of Amazing Customer Experiences

Topic	Industry
1. <a href="#"><u>Coordination across departments</u></a>	Distribution & Service
2. <a href="#"><u>Consistent case management</u></a>	Legal
3. <a href="#"><u>Fundraising with traction</u></a>	Nonprofit
4. <a href="#"><u>Empowered negotiation across the globe</u></a>	Manufacturing & Distribution
5. <a href="#"><u>Taming advertising chaos</u></a>	Media
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7. <a href="#"><u>Product configurator spurs sales</u></a>	Manufacturing
8. <a href="#"><u>Personal service for special needs</u></a>	Nonprofit
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15. <a href="#"><u>Distribution through subscription</u></a>	Wine Subscriptions
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17. <a href="#"><u>Service beyond the sale</u></a>	Manufacturing & Distribution

## #1 Coordination across departments

Relationships with customers are rarely confined to one department or business unit in an organization. To provide great service, all employees need to have a unified, continuous view of customer interactions.

### Control valve distributor coordinates sales and service

#### The challenge

A distributor of industrial control valves provides installation and maintenance for the products they sell. Four different departments, including sales and customer service plus two service delivery groups interfaced with each customer. With no centralized customer management system, each department was blind to what the others were doing.

Customers were frustrated having to explain the same problem over and over. Sales people hoped that they weren't making a sales call to an account that had an outstanding service request.

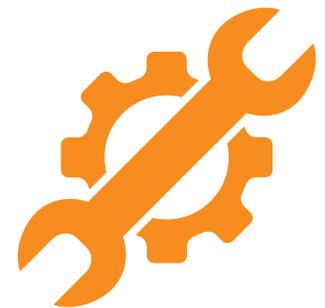
#### The solution

Now that the company uses Microsoft Dynamics CRM Online, everyone is on the same page. Integration with Office 365 means that employees can see every email, appointment and task for an account through Microsoft Dynamics CRM.

Using Skype for Business, sales and service teams can coordinate in real time to ensure that the delivery team goes on the customer site with full knowledge of the situation.

*Industry:*

Distribution  
& Service



#### *How customers are amazed*

When the service technician comes on site ready to tackle the problem with the right tools and parts, customers can get back to work in no time.

## #2 Consistent case management

Those companies that provide an awesome customer service experience every time follow consistent business processes. Microsoft Dynamics CRM Online provides the foundation to guide employees step-by-step.

### Law firm assures equal treatment for all

#### The challenge

The hundreds of attorney's working for a national law firm handling criminal, defense, probate, bankruptcy, divorce and civil litigation each used their own method to manage cases. Every client had a different experience, and the firm had no overall control of processes.

#### The solution

Using Microsoft Dynamics CRM Online, the firm customized screens to help their lawyers track the documents, notes, expenses, and time for each case consistently. The integration between Microsoft Dynamics CRM Online and Microsoft Office 365 provides a secure and centralized system to manage all case activity from the initial phone call through the closing of the case.

Industry:

Legal



#### *How customers are amazed*

Clients are impressed when their attorney has all the details of their case at their fingertips—with Microsoft Dynamics CRM Online every document is a just a click away.

## #3 Fundraising with traction

One of the top challenges for nonprofits is to keep volunteers and donors engaged over time. Through a coordinated approach, nurturing the people who give their time and money, nonprofits can keep their supporters coming back.

### Nonprofit builds on the momentum

#### The challenge

A national foundation providing cancer education, research, advocacy, health services, and social support services raises money through well-known local runs. Coordinating all of the people involved in the races—from sponsors to event leaders to participants—became overwhelming as the popularity grew.

#### The solution

Now, Microsoft Dynamics CRM Online serves as a central system for the foundation. Key to the continued success of race fundraising is keeping track of race teams and results that show participants the value of their contribution.

With insights provided by Microsoft Dynamics CRM Online, the foundation can give each chapter the feedback that keeps teams engaged and the competitive spirit high—across regions and across the country.

Industry:

Nonprofit



#### *How customers are amazed*

Each donor, runner, and volunteer feels like an important part of the cause and primed to return for next year's race.

## #4 Empowered negotiation across the globe

As the internet connects people to a world of data, customers are more educated throughout their buying process. To negotiate and close the deal, salespeople need to be equally well armed with data.

### Manufacturer connects sales force to data

#### The challenge

A cosmetics manufacturer was losing deals because their sales people were unable to negotiate contracts quickly. After visiting a customer, the sales rep had to work with the accounting department to structure a deal and then get approval from their sales managers.

#### The solution

To regain their competitive advantage, the company implemented Microsoft Dynamics CRM Online with an integration to Microsoft Dynamics ERP. With access to client history, margin and inventory, sales people can negotiate pricing based on the overall value of the sale and the long-term business.

The full product catalog available to the sales person gives them the opportunity to upsell customers as they negotiate. Automated workflow routes the quote to the sales manager for instant review and approval. Now, sales reps can negotiate and close the sale in one call.

*Industry:*

Manufacturing  
& Distribution



#### *How customers are amazed*

Working with a sales rep empowered with knowledge about past sales, product availability and current promotions boosts customers confidence in the company and increases sales.

## #5 Taming advertising chaos

The internet has vastly expanded the number of advertising vehicles that media companies can offer to customers. The result can be overwhelming for sales people who need to present all the options to customers.

### Media company automates calculations

#### The challenge

The number of advertising options—from radio and TV to cable and internet—that a media data company could provide to their clients had exploded. The complexity of providing quotes for advertising campaigns to agencies and media buying companies was more than spreadsheets and paper could manage.

#### The solution

To provide their sales team with automation that could manage complex contract quoting, unique to each client, the company implemented Microsoft Dynamics CRM Online. Now quotes are easy for sales reps to build on the fly. Working anywhere, from the home office to the client's meeting room, customers can compare mediums, time slots and demographics to build a media buy that fits their requirements.

Integration with Microsoft Dynamics ERP provides customer history to help the sales person structure the quote quickly. Applicable special promotion discounts are applied automatically.

*Industry:*

Media



#### *How customers are amazed*

Media buyers get to work with a sales person who knows their history and has all the options at their fingertips to design the perfect advertising campaign.

## #6 Mobilized sales in the field

When sales and service personnel working in remote locations don't have information like inventory availability and current pricing, customers have to wait for quotes.

### Oil and gas equipment company goes mobile

#### The challenge

The sales team for an oil and gas equipment company was responsible for visiting sites to gather the information to create quotes. Taking their notes back to the office, the sales people entered information into pre-populated Microsoft Excel templates to calculate service costs such as time, travel, labor, parts, and per diems.

#### The solution

Automating the entire process with Microsoft Dynamics CRM Online, the company now delivers the information to the sales team's mobile devices. Integration with ERP, provides access to inventory in stock and current pricing. Service quotes that once took days are now completed in less than three minutes.

In addition, with access to installation service schedules managed in Microsoft Dynamics CRM, sales reps can tell the client when a technician can be on site.

*Industry:*

Oil & Gas



#### *How customers are amazed*

When equipment fails, customers find out exactly how much it will cost and when it can be fixed so they can make decisions quickly and get back to work with minimal downtime.

## #7 Product configurator spurs sales

Buyers today want lots of options—to build the product just as they want it. They also want to see what their selections will look like.

### Outdoor living products manufacturer closes deals on the first call

#### The challenge

For a company specializing in creating spectacular outdoor cooking facilities for customers, painting the picture of what the final project would look like was important. When a customer couldn't visualize the way their deck or patio would look, they tended to delay the decision on such a big investment. With all the possibilities, from building materials to stove top finishes, it was difficult for customers to envision the finished space.

#### The solution

To help the customer picture the outcomes, the company uses a product configurator in conjunction with Microsoft Dynamics CRM Online to visually and interactively create the design in the store or at their home. Through a tablet device, the salesperson can show the customer all the options and provide a quote at the same time.

By the time the sales call is complete, the manufacturer either has a closed deal or a highly qualified lead. For leads, the salesperson has the final configuration at their fingertips to revisit with the customer.

*Industry:*

Manufacturing  
& Distribution



#### *How customers are amazed*

Customers love being able to select the options and see the results in real time—envisioning themselves hosting guests in the new space.

## #8 Personal service for special needs

Working with accurate, timely data is always important, but for nonprofits serving people in need, giving the correct answer to every question takes on a special importance.

### Nonprofit coordinates case management for developmentally disabled clients

#### The challenge

A nonprofit organization dedicated to connecting developmentally disabled adults with the resources they need to lead independent lives was struggling as they grew. Serving more clients meant coordination between more people and more agencies. With no central client management system, each case required time-consuming research.

#### The solution

Through Microsoft Dynamics CRM Online, staff members now have access to client records with full information on their status with each program—from acceptance through services received. When calls come in, the phone number identifies the account or automatically sets up a new one. More staff time is saved with automated call logging and easy document attachment.

Staff has full access to information on a wide range of programs directly from Microsoft Dynamics CRM. Staff can search on specific requests while they are speaking to their clients.

Industry:

Nonprofit



#### *How customers are amazed*

When clients call the nonprofit, they get immediate attention from staff members who have more time and better information to provide caring, personalized service.

## #9 Tiered support on the fly

Customers lose patience quickly when their support issue has to move through multiple departments for resolution. A single source of customer support solves the frustration.

### Telephone and broadband service company goes with the flow

#### The challenge

A telephone and broadband service provider was using multiple systems to manage support calls. If Tier 1 support couldn't fix the problem, a paper work order was issued to Tier 2. If Tier 2 couldn't resolve the issue, a new work order was created which the field service technician would pick up the next morning. The process was slow, work orders were often lost and customers were not happy.

#### The solution

Using Microsoft Dynamics CRM Online, the broadband company now offers one-call tiered support for customers. Tier 1 level support is handled through Microsoft Dynamics CRM dialog functions, allowing service reps to ask guided questions that fix the most common problems. Issues that require higher levels of support are quickly routed to Tier 2 support. If needed, the Tier 2 service reps route case information to field technicians through tablets and smartphones. Those engineers, already in the field, resolve the case and move on to the next job.

Industry:

Telecom



#### *How customers are amazed*

Customers are rebuilding their confidence in their regional telephone and broadband company now that service calls are dealt with promptly...with just one call.

## #10 Support for complex sales

When the products and services a company sells are complex, the sales person can only take the deal so far. They need the experts of the organization to provide the full story to customers.

### Financial Services company taps the experts to close the sale quickly

#### The challenge

A leading financial services firm provides a variety of investment programs to credit unions. When a credit union wanted to ask in-depth questions about a particular program, the sales reps would have to schedule a meeting with the product manager. Coordinating the schedules of everyone involved could take weeks, bogging down the sales process.

#### The solution

With an integrated solution including Microsoft Dynamics CRM Online and Skype for Business, sales reps are able to detect the presence and availability of product managers online. They can set up a video call instantly to bring the corporate expertise to the table.

With integration to Office 365, sales reps can create the contract and close the deal on the first call.

*Industry:*

Financial Services



#### *How customers are amazed*

The credit unions can offer strong investment programs to their customers with full confidence that they understand the details.

## #11 Matching venues and events

When a business has multiple locations with unique services at each one, matching customers with the best options can get complicated fast.

### Hotel group markets events across locations

#### The challenge

A regional hotel group with three popular facilities was using separate systems to manage each location. If one hotel didn't have availability or a large enough room, they asked the customer to call the other hotel.

Marketing lists were also maintained separately, so there was no cross selling to potential shared customers.

#### The solution

Using Microsoft Dynamics CRM Online, integrated with their event management software, the hotel group now serves their customers with unified data. Customers use the website, or call one number, to evaluate all their options. They can find the dates and facilities that match their event easily, making the experience pleasant from the start.

With unified customer data, the marketing team can segment groups and focus promotions on the most likely prospects.

Industry:

Hospitality



#### *How customers are amazed*

When customers contact a hotel to start planning their event, they get more than they expected with all their options—across the hotel group's facilities—in one place.

## #12 Scheduling increases utilization

In the professional services business, cash is king. Increase billable hours and reduce collection time for a winning cash flow combination.

### Accounting firm simplifies scheduling and accelerates billing

#### The challenge

A regional accounting firm had lower utilization and slower collections than industry averages. Looking for the root of the problems, they identified inconsistent scheduling practices among their accountants and inefficient billing processes.

#### The solution

Using Microsoft Dynamics CRM integrated with Office 365, the firm implemented centralized scheduling. Either online, or by calling a central number, clients have access to their accountant's available hours to schedule time instantly. The utilization of the firm has soared while allowing the accountants to design their own schedule.

To accelerate collections, at the end of each session the accountant enters the time and services delivered for each client. The information is automatically routed to Microsoft Dynamics GP for billing. Invoices are sent out the same day, eliminating billing lag.

Industry:

Professional Services



#### *How customers are amazed*

Going to the accountant may not be fun for anyone, but customers appreciate how easy it is to schedule. And receiving their bill so quickly gives them confidence that the firm clearly appreciates the time value of money.

## #13 Partnering with distributors

Building tighter relationships through better communication and shared marketing tools with your distributors can drive sales and goodwill.

### Bike manufacturer helps distributors sell more

#### The challenge

For a bicycle manufacturer, regional bike shops are an important part of their business. Competition was fierce, and the company wanted to build better relationships, but business owners were busy and didn't want to spend time with salespeople.

The company needed a more efficient way to provide product information and make it easier for dealers to handle warranties and parts.

#### The solution

With Microsoft Dynamics CRM and Office 365, the manufacturer centralized information specific to each dealer. Salespeople send them notices of new product releases, and dealers can access the information directly.

Warranty information for all of the dealer's sales is available through the dealer portal. Through integration with their ERP, parts and service orders can be tracked through the portal as well.

*Industry:*

Manufacturing  
& Distribution



#### *How customers are amazed*

Dealers appreciate the manufacturer's commitment to making their interactions easier and can recommend the bikes with confidence in a company that stands behind their warranties.

## #14 Collecting data in field

The hand held devices available today combined with cloud software are breaking down the walls around all kinds of services—which can be delivered just as well in the field as they can in the office.

### Healthcare provider visits the elderly in their own homes

#### The challenge

Responding to the growing percentage of elderly patients in their practice, a regional healthcare provider started a home-visit nursing program. While in the patient's home, the nurses would provide limited services, like flu shots, and measure vital signs.

#### The solution

Using tablets to record data at the patient's home, nurses are connected to Microsoft Dynamics CRM Online. Historic data for each patient is tracked so the nurse can monitor trends.

Through integration with Skype for Business, nurses can confer with doctors in real time, sharing video when needed.

Since all notes and data are entered in the patients' homes, nurses don't have to spend time in the office and can visit more people each day.

Industry:  
Healthcare



#### *How customers are amazed*

The home-visit nursing program allows elderly patients to avoid contact with sick people in the doctor's office and receive the regular medical care that allows them live in their own homes longer.

## #15 Distribution through subscription

With easy access to all kinds of products through the internet, building loyalty with your customers takes attention to detail.

### Wine of the month builds loyalty through data

#### The challenge

A startup wine of the month business needed to keep track of subscriptions, manage products kept in multiple warehouses and build their business through smart marketing.

#### The solution

Microsoft Dynamics CRM Online, integrated with Microsoft Dynamics ERP and Office 365 provides the company with a complete business management system. Shipment notifications are sent to customers so that they know exactly when their wine will arrive. Subscription renewal notices are sent automatically with reminders at predefined times.

In addition to great service, the wine company uses their data to build value to customers. Working closely with wineries, the company creates special promotions that will appeal to unique sets of their customer base. Subscribers get the opportunity to purchase limited vintages and special blends—designed just for them.

*Industry:*

## Subscription Distribution



### *How customers are amazed*

Customers get the full value from their wine subscription plus get the benefits of being “insiders” in the wine industry.

## #16 Multi-channel customer service

Customers today expect to be able to communicate with vendors through multiple channels and on any device.

### Coffee processor and distributor communicates with customers across channels

#### The challenge

A growing number of the hotels and specialty store customers of an upscale coffee processor and distributor were asking for easier ways to place orders than by phone.

#### The solution

To support multi-channel communications, the company is using Microsoft Dynamics CRM integrated with Microsoft Dynamics ERP. When customers contact them—through phone, email, online or chat—customer service reps can see all the details about the account including outstanding quotes and orders.

Responses are fast and accurate, building customer loyalty and a reputation for outstanding service.

Industry:  
Distribution



#### *How customers are amazed*

Customers can send a text with a last minute addition to their order and get a response letting them know that the extra stock is on the way.

## #17 Service beyond the sale

For manufacturers and distributors today, the relationship with the customer doesn't end with the sale. Supporting customers with services, documentation or even a recall requires commitment after the sale.

### Medical device manufacturer follows through on commitment to customers

#### The challenge

A medical device manufacturer serves a broad range of customers, from medical patients to athletes to health providers. With separate systems to manage different business functions, business processes were paper intensive with multiple data entry points.

#### The solution

Using Microsoft Dynamics CRM Online integrated with ERP to centralize their customer information they can now manage each order through a full-cycle, closed-loop process. Sales reps can place orders and check on order status for any segment of the business.

A key benefit of the system is putting the product information that customers need to file for reimbursement or insurance coverage at the fingertips of service agents. With product ownership data in the customer's account, reps can email documentation in an instant. In the unlikely event of a recall, the company has all the customer and product information they need to be proactive.

*Industry:*

Manufacturing  
& Distribution



#### *How customers are amazed*

With the complexities of health insurance coverage that consumers and health care providers currently have to manage, a vendor that can respond to their request in an instant is a relief.

# Your business or nonprofit can deliver amazing customer experiences

With Microsoft Dynamics CRM Online and cloud business management solutions, your employees can make every customer interaction count. Just like the stories we've shared, connected systems that empower your employees can deliver amazing customer experiences.

## Next steps

You need a partner who can help you get the most from Microsoft Dynamics CRM and can truly revolutionise your business. Experts in Dynamics CRM that have a proven track record and qualifications to boot.

Caltech CRM can help your company be truly amazing just like these organisations in this white paper. We can help you take the next steps and get the most value from Dynamics CRM.

We have been aligning CRM solutions to precise individual needs since 1999. Our team of Microsoft Certified consultants and developers can make Dynamics CRM a success for you.

- Visit: <http://www.caltech.co.uk/why-caltech-crm/> to learn more about us and how we do CRM well.
- Check out our free resources to help you on your CRM journey, every step of the way. <http://www.caltech.co.uk/crm-popular-resources/>
- Trust us to help your company be amazing, by contacting us:

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## About Caltech

We aren't in the business of being the same as other CRM consultants. We work together as a team to create long term relationships with our customers and help them realise the benefits from Dynamics CRM.

### **Delivering CRM excellence**

We are 100% focused on CRM – it's what we live and breathe! We have been working with Microsoft Dynamics CRM since 1.0. We have implemented complex Microsoft Dynamics CRM customizations; and we know what works. We ensure that you get the most out of the software saving you wasted time and effort, using proven project methodology.

Implementing Dynamics CRM can be complex, but we are here to help you get the most from it.

### **Dynamics CRM Consultancy**

Caltech CRM helps design and build a solution that is right for each individual client. Our expertise is available just as long as it's needed to accelerate project development and ensure a project is completed with the best technology for you, on time and budget.

When you work with Caltech CRM you are partnering with expert Dynamics CRM consultants.

### **Customer Success**

We take time to scope your requirements to ensure we are meeting your exacting needs and any foreseeable future needs. We do this to ensure you get the right system and to ensure it's the best option. We strive to work with clients to ensure that their return on investment is maximized.

With over 400 implementations of CRM solutions we can really offer great advice from scoping your CRM requirements, to supporting your site. Furthermore we will give you a sound structured Microsoft Dynamics CRM solution you can trust.

We are a hard-working team dedicated to delivering the best for our customers, and hold the Microsoft Dynamics CRM Silver award.

### **Contact Caltech CRM to learn more**

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