

A Guide to Upgrading Your Manufacturing CRM



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Customer Relationship Management (CRM): An Introduction

Managing a company's relationships and interactions with customers and potential customers is critical to the success of a business. Having a network to improve business relationships can streamline processes and increase a company's bottom line. With today's technology, staying connected to customers is easy and efficient with the right technology.

Customer Relationship Management (or CRM) systems enable manufacturers to stay ahead of the complexities of the manufacturing industry. Manufacturing CRM eliminates the challenges of forecasting effectively, channel management, sales productivity, and field service operations.

The single modern manufacturing CRM system supports management of up-to-date customer data, sales management, team communication, tracks phone calls, email, meetings held, and facilitates social media correspondence. It organizes information into digestible formats that revolutionizes how business is conducted.

A CRM system is a web of modules usually including sales, customer service, field service, project service automation, marketing, and human resources. CRM systems are common across several industries. Notably, however, a manufacturing CRM system combines key product features to personalize customer experiences and accelerate your sales process:

- ✔ **Centralize Customer Information:** CRM systems provide businesses with the ability to view customer information from order history, to communications, to service issues.
- ✔ **Improve Demand Forecasts:** Sales pipeline data builds more accurate revenue and materials/resource forecasts.
- ✔ **Coordinate RFP-Driven Sales Efforts:** Team members can collaborate on responses by using centralized document management and workflows to guide sales processes and meet RFP requirements.
- ✔ **Improve Dealer Relationships:** Self-service portals improve sales efficiency, reduce response times, and cut internal workload. It allows dealers, distributors, and service partners to see product availability and pricing information.
- ✔ **Communications:** Instant messaging and email tracking, content sharing, and other communication functions.



How Can CRM Systems Help Your Business?

Never miss an opportunity to close deals and grow customer accounts. Manufacturing CRM systems work closely with your team to achieve your growth potential and identify solutions that accelerate your business forward. Assessing your company's need for CRM technology or evaluating your current CRM system for functionality is key to ensuring that your investment in these systems work for your business.

A CRM system is a proven solution for helping any business succeed. It caters its functionality for your business' specific mission. CRM systems keep customer contact details up to date, track customer transactions, and manage accounts for better business-customer relationships. Keep track of all your customer's details and interactions with one fluid system, instead of relying on multiple forms of data collection, or simply the overextended minds of employees.

Companies That Use CRM Systems

Leading companies from around the world use CRM systems and experience great results. CRM systems serve businesses across multiple industries, including automotive, education, manufacturing, media and communications, and retail and consumer goods.

Over 23,000 organizations around the world use Microsoft Dynamics as their system of choice. This agile and multi-functional platform helps reduce costs, improve profit margins, and streamline business operations.

The best CRM systems enable discrete, automated, and lean manufacturers to drive digital transformation for increased business value, optimized operations, and actionable insight. In this manner, manufacturing CRM systems are foundational to understanding the needs and challenges associated within the industry.

Evaluating Your Current CRM System

Certain CRM systems stand apart from the rest and will put your business ahead of the competition. With optimized operations, your business will shift from reactive to proactive and anticipate all your customer's needs while improving your supply chain.

When utilized effectively, CRM systems have the capacity to transform your business through innovative

product offerings, automated processes, and by leveraging machine learning and predictive analytics. They allow you to customize your employee and customer experiences without coding or other complexities. Evaluating your current CRM system with a keen eye towards comparison with the offerings of Microsoft Dynamics 365 may allow you to improve efficiency and agility. Specifically, your business's time and money can be tracked exactly for better analysis of where energy should be spent.

How is Microsoft's CRM System different?



Microsoft Dynamics 365 unifies CRM and ERP into cloud applications that work together to empower your employees by connecting people, process, and data across multiple media forums, including Dynamics 365, Office, LinkedIn, and Azure IoT. With the many benefits this platform offers for customer engagement, it can help you anticipate your customer needs and improve business outcomes with data driven insights and project service automation. This digital transformation leverages machine learning and predictive analytics to streamline everyday tasks and create business efficiency.

Microsoft CRM system services help lower cost of ownership, increase profitability, and offer other benefits, including:

- ✔ **Master Multi-Channel Marketing & Service:** This feature allows businesses to respond to potential customers and current customers quickly and cost-effectively. It offers chat boxes, websites, personal portals, social media engagement, and email and phone avenues for communication.
- ✔ **Enable Field Operations:** A field personnel can manage work orders, office staff can dispatch service resources and manage schedules based on skills, certification, availability, and geography.
- ✔ **Dashboard Analytics:** CRM systems allow for leverage of scalable and adaptable data and analytics solutions to transform data into actionable insight that will impact business growth. Analytic solutions provide clients with nearly real-time accurate information that is easily digestible and visualized.
- ✔ **Automated Quote Process:** The automated quote process is time efficient, reduces errors, automates approvals, and enforces pricing consistency. Save time on re-entry when quotes are converted into orders.

- ✔ **Manage Customer Warranties:** Capture information from customers and create work orders for repairs through this simplifying warranty process. Required documents are easily submitted and coordinated smoothly with OEM review and approval of claims.

Microsoft's manufacturing CRM system stands apart from the rest because the program helps businesses connect with the right buyers, identify prospects, and tailors engagements. Combining sales, marketing, and service into one system will change your business. It is easy to use a CRM system like Dynamics 365 CE since it was built for the cloud on modern technology and makes it easy to administer and integrate.

MCA Connect understands that many operational processes are based on industry best practices. In today's market, cutting the competitive edge means offering your customers complete customer service and incomparable experiences. This implicates several aspects of your operation like sales, field services, and communications. An effective CRM solution streamlines low-value activities to focus on customizing the areas unique to your business. To help ensure success in this regard, MCA Connect's commitment to your company includes proactive guidance and unlimited reactive support, which includes identifying and resolving issues quickly and keeping systems up to date.

Improving Your CRM: Are You Ready for a CRM System Upgrade?

A CRM system is a resource and technology that will streamline your sales and help your business achieve its goals. Such a system makes it easy to analyze profit margins, track opportunities, and follow up on quotes before they expire. Knowing when your business is due for a CRM system upgrade is important. But how do you know when you are ready for a CRM upgrade or replacement? The answer to this question begins with an analysis of your unique requirements and the potential inefficiencies of your existing solution.

First, a centralized system and process is a must-have for effective customer service and engagement. An effective CRM solution provides a platform to see quotes, price changes, accuracy of data, and smooths out every quote approval process. It supplies a stronger collaboration between marketing and sales and accurate sales forecasting. By doing so, a full-suite CRM system provides better customer experiences and improves customer loyalty.

Second, an effective CRM offers business intelligence insights. With a good manufacturing CRM system, deep business insights and accelerated productivity are possible. By capturing these benefits, you will see increased revenue thanks to better management and more profitable projects and services.

Third, your CRM solution should be holistic. A CRM upgrade that improves enterprise visibility of customer information across all sales, customer service, and purchasing across all regions vastly improves productivity, efficiency, and customer experiences. The best CRM systems enable faster and better decisions with reliable and accessible information while simplifying the sales process.





Choosing the Right CRM Partner

Choosing the right CRM partner comes down to which features fit your business' needs and preferences. With all the reputable CRM solutions and partners in the marketplace, it can be overwhelming to figure out where to start. Each system comes with its own programming pros and cons and it is up to you to figure out which is most suitable for you. However, the main components of good partnering choices include functionality, price, and customization.

Qualifications and Red Flags

Depending on the platform you choose, different CRM providers offer varying degrees of ability in meeting your needs. Businesses already integrated with other Microsoft services, such as Outlook and Office 365, should seek out experts in Dynamics 365 to ensure optimal compatibility.

Once compatibility is established, one of the most significant differences in choosing the right CRM partner is price. Notably, cheaper does not always mean you are getting a better deal. The downside with cheaper partnerships is that they are not customized, do not have the capacity for personalized services, and the relationships tend to be more difficult to navigate.

Expertise

The right CRM partner will help ensure that your outside contractors' function as an extension to your business team. This will allow you to run your programs flawlessly and focus on new opportunities to innovate and increase profits without sacrifices in quality. Be sure to demand the dedicated pool of resources with diverse skill sets your company needs to achieve the intended results.

Setting yourself up for success begins with finding a partner that is forward thinking, progressive, and full of proactive advice and guidance. Do not settle for the bare minimum. Instead, excel in a world of possibilities. Receive the advanced strategic technology leadership and guidance, full software support, and an undivided trusted advisor you deserve by partnering with MCA Connect.

Unique Features of Manufacturing CRM

CRMs are useful across industries, but certain features are uniquely valuable to manufacturers and other companies within the supply chain. Manufacturing CRM systems, for example, provide a platform that allows manufacturers to make product demand decisions based on forecasting features. These features incorporate visibility into the sales pipeline.

A great manufacturing CRM also increases customer engagement. The ability to make tailored solutions for your business while lowering the cost of support is unique to Dynamics 365, putting this platform head-and-shoulders above other options.

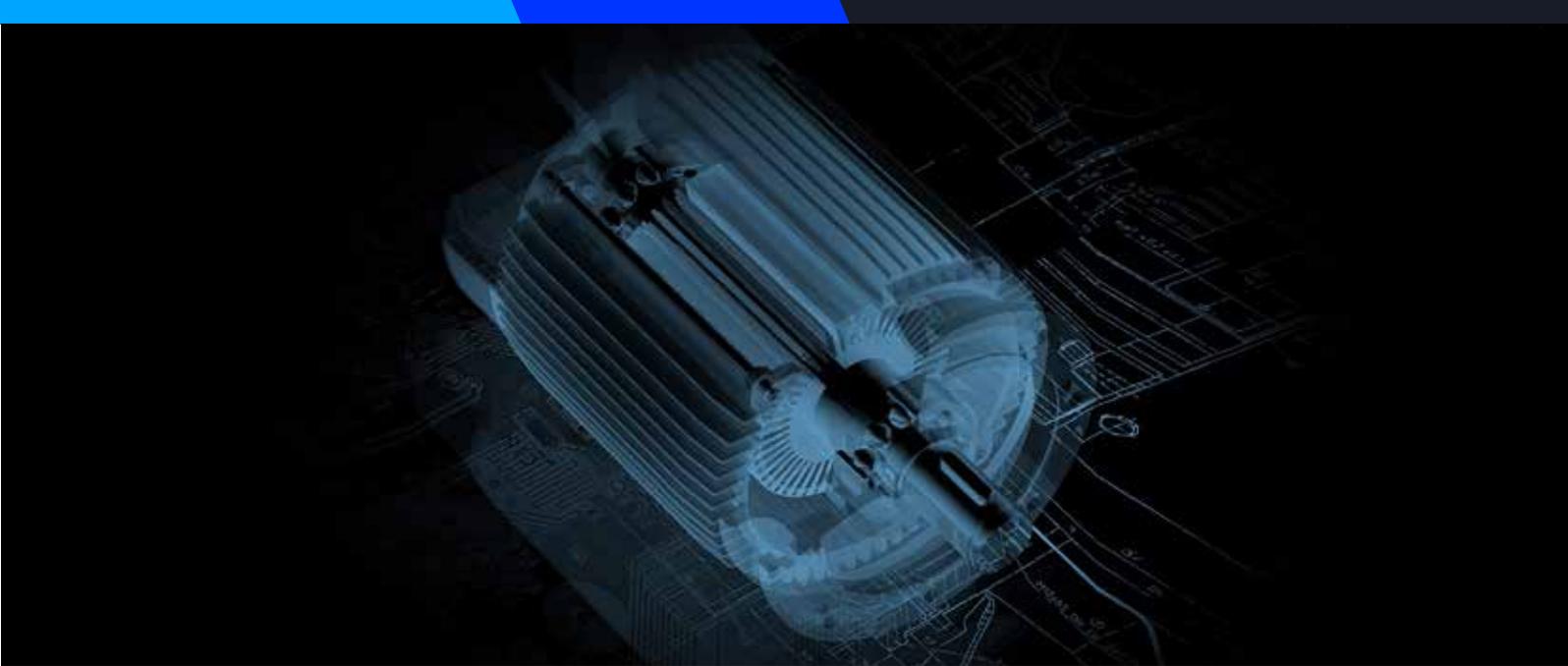
Some key Microsoft CRM solutions for manufacturing include:

- ✓ **Lead Identification and Routing**
- ✓ **Activity Planning and Loyalty**
- ✓ **Tender and RFP Management**
- ✓ **Track Customer Assets**
- ✓ **Schedule and Dispatch Service Resources**
- ✓ **Real-Time Quote and Order Management**
- ✓ **Channel Management and Distributor Portal**
- ✓ **Forecasting Across Multiple Periods**
- ✓ **Tracking and Management of Field Work Orders, Service Issues, RMAs, and Warranty Claims**

Manufacturers can customize their CRM solutions and personalize the interface with numerical data and large charts and graphs. Microsoft graphs help viewers absorb information quickly and efficiently. Microsoft's manufacturing CRM also has easy integration with other Microsoft software; no other CRM solution offers the same degree of interoperability and compatibility. Dynamics 365 is business-ready with a variety of Microsoft services.

Microsoft Dynamics 365 CE is an agile and effective CRM platform. To unlock its full potential, help your team build a strategic plan to meet desired business objectives supported by our modern technology applications.





CRM Strategy

Upgrading your manufacturing CRM can improve customer relationships and satisfaction. It can also refine operations for better efficiency, improved market testing for new products, and increased sales. However, before integrating a CRM platform into your operations, be sure to consider the best practices for a successful implementation of your new CRM system to help avoid many of the common pitfalls.

To realize the full potential of an upgraded manufacturing CRM, it is critical to begin by engaging the right stakeholders. The CRM upgrade will be most successful with buy-in from all levels within the organization combined with partnerships with productive external stakeholders.

Stakeholders

Top management has the power to make the new CRM an organizational priority and therefore is key to a successful and headache-free CRM upgrade. Other key internal stakeholders are the IT team who can be trained to troubleshoot and solve common technical issues and questions as well as project managers who can promote it internally and set key goals and objectives. For best results, a supportive and knowledgeable external team offers benefits that can ease the internal CRM rollout by providing technical assistance and tailored customer support. A skilled external team with expertise in the manufacturing sector specifically can help you create a competitive advantage and build operational excellence.

A Roadmap to Success

Both internal and external stakeholders can use a reliable roadmap to guide their CRM upgrade strategy. Within your company, begin by identifying specific and measurable goals that a new CRM can achieve, and consider what actions and customized approaches can help both the customer and your company. A company task force assigned to identifying internal strengths and weaknesses can be helpful for anticipating problems. An informal focus group of honest customers can also help inform the process from the customer side and can guide the development process. External partners like MCA Connect can further assist by developing a tailored CRM strategy specific to the manufacturing sector.

Good CRM practice uses an approach that emphasizes the customer experience while also addressing internal weaknesses. This includes assessing things like ordering and shipping delays or communication inefficiencies. By looking inward, companies can build on their strengths in product and industry knowledge or customer relationships while also addressing their weaknesses. The best CRM partners will help your company set timely key performance indicators (“KPIs”) to gauge performance and use the KPIs to regularly adjust the CRM strategy for the benefit of customers and company reps.

Customization

Any successful CRM upgrade strategy will be customized and tailored for the specific industry and company. Prior to implementation, it's helpful to consider the CRM upgrade best practices that will enable you to best utilize this technology for your particular company and software needs. For a specific example of an effective manufacturing CRM revamp, see this case study on the results of a CRM upgrade in the real world.

Avoiding Pitfalls in CRM Implementation



A manufacturing CRM upgrade can lead to positive results for your company. However, there are some common mistakes when implementing a new CRM. Listed below are the common mistakes and ways to best avoid them:

- ❖ **Not fully exploring requirements**

Implementing a new manufacturing CRM has numerous requirements, and not just technological. Prior to committing to a CRM upgrade, first learn about implementation details including software and workflow needs. Importantly, you will need to consider whether you will need to make changes that are not technological. A readiness assessment with an expert can ensure a CRM upgrade is a sound investment and will address your company needs and will not just become underused, frustrating technology.

- ✔ **Not including end-users in the decision-making process**

Nearly all CRM upgrades that fail suffer from user adoption issues, not technology issues. This problem affects everyone, including end-users like the sales team, engineers, IT personnel, and customers. Engaging end users in the decision-making process gives them buy-in and a stake in the success of the project. Engage the primary end users at the beginning of the project and task them with responsibilities regarding planning and implementation.

- ✔ **Underestimating budget**

Upgrading your CRM will cost more than the technological change alone and can be particularly expensive if goals change mid-way through the process. New ideas and solutions during the implementation process lead to big budget increases. From the start, be specific about what aspects of your business you want to improve. Address the budget with your provider and consultants at the beginning of the project, but also remember that CRM upgrades are demonstrated to decrease costs, increase revenue, and enable your company to grow more quickly.

- ✔ **Underestimating time or resources**

Like underestimating a budget, a CRM upgrade will likely take more time and/or resources than expected. Factor an underestimation into your projections and ensure that you have time and additional resources that you can devote, if needed, and consider the long-term positive impact on efficiency the CRM upgrade will have.

- ✔ **Irregular communication**

Poor communication can leave employees frustrated and fearful of the changes being thrust upon them. Help employees get excited and engaged with the project through effective communication by providing vendor selection announcements, quick win highlights, and regular process updates.

- ✔ **Not taking advantage of features and customization**

Today's manufacturing CRM software from Dynamics 365 Customer Engagement is immensely powerful, capable, and customizable. The software also continues to change, which makes it even more important to work with a partner you trust. When you work with a manufacturing CRM expert to implement an upgrade be sure they can train end users in relevant features. Consider making a select few employees super users who are trained in nearly all the features and able to advise colleagues and customize the system.

- ✔ **Not investing in training and change management**

Many CRM implementations fail due to a lack of an effective change management plan. Implementing a new business system is a major change that many organizations take for granted, and the best way to address this is to receive change management guidance from an expert. Ensure that new staff onboarding training plans are created during the implementation process while the information is fresh.

- ✔ **Making assumptions**

When implementing a manufacturing CRM upgrade, it is critical that you do not make assumptions about your internal team's abilities or knowledge. Instead, be open and curious in the process and seek out a way to continue to develop your company's abilities. This open mindedness and desire to learn will ensure your company can benefit as much as possible from the upgraded software and implementation process.

Many implementation partners start and end with the technology. But consider choosing one who believes that the technology should be addressed only after the people, process and performance management goals have been determined. Having a plan for training and informing end users for your manufacturing CRM implementation facilitates a smooth transition from start to finish.

Deploying Your CRM Solution

One of the initial steps for developing and executing an implementation plan is to assemble your teams. Gaining buy-in from your internal team at the start of the project is key to a successful manufacturing CRM solution deployment. Begin by aligning business goals and vision with the senior management team. Getting senior management's support can ensure the CRM deployment has both adequate resources and prioritization. After the executive team is established and supportive, it is time to bring in members of the team who will be directly working with the upgraded manufacturing CRM solution.

Supply chain specialists, the sales team, production planners, and the customer service team are integral to effective CRM implementation. Get these individuals involved early to test the upgraded CRM solution so that they will have time to better understand the system and have an improved capacity to communicate technical challenges and workflow inefficiencies.

In addition to building your internal team, it is critical to have a strong external team involved in deploying your CRM solution. This team includes any consultants or providers and they should be experts in deploying manufacturing CRM solutions. Your external team should offer implementation services that help translate your business needs into a functional solution. They can advise you on needs for your specific industry and ensure the deployment meets those needs. Also, the external team can help to develop an implementation plan that will help ease the changes within your organization.

During the deployment stage of a CRM upgrade, data migration will be your friend. Use deployment to cleanse your data. Identify inefficiencies, redundancies, and other problems, then use the CRM solution to work toward correcting them and developing measurable performance indicators. Data migration will save you time and ensure the new CRM solution will be impactful.

An effective external team can prove critical to ensuring your CRM solution makes for a smoother deployment and places value in the people, not just the technology. Significant changes mid-deployment



can cause a budget to blow up. Be specific with what you want from the start, and make sure that your expectations are aligned with your budget to prevent major headaches during deployment.

The go-live moment is one of the most exciting and nerve wrecking aspects of CRM deployment. Be sure to devote a team consisting of internal and external stakeholders to monitor go-live. They can spot mistakes and bugs and work on real-time solutions to the inevitable problems. While go-live and other stages of deployment can feel like the culminating event, it is critical to continually evaluate success and monitor the big picture. Develop milestones for success that are specific to your organization and track key performance indicators to gauge your progress toward the milestones. Be sure to include external stakeholders in these discussions as they may offer a perspective that your internal team overlooks.

Throughout the process, it's important to remember that how you implement the technology can be just as important as the technology itself. A key aspect of this is training employees and gaining buy-in. You can do in-person training which has the benefit of allowing for real-time feedback and in-depth communication. Role-playing and practicing, both key elements of training, may be easier in-person. However, e-learning may be more practical for many organizations. Given our modern world, this may be easier than in-person training and can be done from any location including a home office. If you need additional support, there are services available for any type of training related to deployment you need.

Support for Ongoing Success



After long hours and energy spent on a successful manufacturing CRM implementation, it may feel as if go-live is the end of a major project. While it is a milestone to be celebrated, in many ways, it's just the start. Ongoing support post-implementation can ensure maximum ROI of an upgraded CRM.

For the best results, consider the differences and offerings of managed services vs. MCA Advantage. Traditional managed services are generally reactive and use support tickets to provide help. With the MCA Advantage service team you get industry specific experts to provide proactive guidance and unlimited reactive support, all for a set fee. The MCA Advantage service team acts as your trusted advisor, providing strategic technology leadership guidance, as well as unlimited software support.

In addition to MCA Advantage, MCA Connect offers real-world experience, best practices and a client-centric focus to deploy systems and solutions that deliver exceptional results. Those results come from working on more than 1,000 CRM and ERP implementations, and over that time they've distilled 5 of the most important aspects for maximizing success. In addition to using experience to reflect on what leads to a successful CRM implementation, MCA Connect looks forward in order to anticipate business needs.

To better understand what a partnership with MCA Connect looks like in the real world, consider the case study of Ascend Performance Materials. With Ascend, the upgraded CRM enabled them to not only better manage sales, but also to improve product research & development, supply chain management, quality control, and customer service. Similarly, the AmerCareRoyal case study shows the drastic impact that streamlining the sales process can have on an organization and its sales reps. Ascend Performance Materials and AmerCareRoyal are just two examples of the potential partnership with MCA Connect.

Founded in 2002, MCA Connect is committed to helping you realize your vision, so you can focus on what matters. Contact us to discuss your manufacturing CRM options or any other services that leverage the power of Microsoft Dynamics 365 to improve your operations.

