



Microsoft Dynamics Customer Solution Case Study



Customer: AbeTech
Web Site: www.abetech.com
Customer Size: 1-99
Country or Region: USA
Industry: Materials Handling
Partner: OTT, Inc.

Customer Profile

AbeTech of Rogers, Minn., provides integrated bar code, RFID, mobile computing and labeling solutions for manufacturers, distributors and retailers.

Software and Services

- Products
 - Microsoft Dynamics GP
 - Microsoft Dynamics CRM

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AbeTech tackles fast growth with integrated technology system

“In the past IT spent more than 10 hours per month syncing databases. OTT’s configuration of Microsoft’s Dynamics CRM platform we have been able to cut data entry time in half, resulting in cost savings and improved customer communications.”

Nicky Schmidt, IT Manager, AbeTech

Founded in 1992 as Abraham Technical Services, Inc., AbeTech operated its first two years from a spare bedroom in the home of owner Steve Schmidt. Within six years, it had 70 employees with offices in four states. The company had separate databases with different software systems. Now, AbeTech’s data is connected through Microsoft Dynamics CRM 3.0, reducing costs related to data entry and employee productivity.

Business Needs

As happens with many fast-growing firms, AbeTech expanded rapidly through a collection of disparate technology systems. The company was using three separate databases: Microsoft Dynamics GP for accounting, Wennsoft for customer service scheduling and ACT! for sales leads. Customer and prospect data also were kept in forecasting spreadsheets and other marketing data sources.

As the business tried to maintain the content of these multiple systems, data integrity

became an issue. A lack of integration impacted the quoting and sales processes and led to duplicate entries of data in various databases, exposing the risk for errors inherent in this methodology.

Data in the sales database was inconsistent, and much of it was old and therefore unusable. To make sure that the company was staying on top of the issue, the IT staff spent roughly 10 hours per month simply ensuring that the three systems were updated with the correct information.



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Not only did the company find it challenging to manage customer data, but it proved difficult to update product lists which made it challenging to provide customer quotes accurately.

Since the system was not integrated, quotes and orders could not be attached directly with a particular customer's record. The sales team had to spend additional time reviewing the multiple databases to grasp a historical perspective of a client's business, sales success and potential future needs.

AbeTech realized that with so many different repositories of data, the entire process of working with customers was not as efficient as it could be and decided a unified approach would benefit their business as well as their customers. Doing so would streamline the company's processes allowing for greater workflow and provide employees with tools to improve customer experience.

Solution

AbeTech sought a way to integrate its data to provide the visibility, speed and accuracy it needed to compete as a fast-growing business. The company worked with Microsoft Gold Certified Partner OTT, Inc. of Minneapolis/St. Paul to develop a customer relationship management strategy to achieve these goals.

OTT, Inc. began with a business process analysis from which it made recommendations on how best to use technology to meet AbeTech's specific needs. Then OTT, Inc. designed and customized an integration solution built on Microsoft Dynamics CRM 3.0, configuring the system's leads, accounts, contacts, opportunities, products, quotes, orders and invoicing functions. OTT, Inc. selected Microsoft

Dynamics CRM 3.0 as the central platform as it was designed with the technical flexibility AbeTech needed to run its business.

To connect all of AbeTech's data, OTT, Inc. migrated information from the ACT! database to the CRM system and created a two-way integration with the accounting system for customer information, products, orders and invoices. Finally, OTT, Inc. set up integration between the accounting system and Wennsoft so that customer data would flow appropriately among the three systems.

As with all new technologies systems, AbeTech wanted to make sure its team was prepared to use it to drive its business. OTT, Inc. trained the various AbeTech teams on best practices in using Microsoft Dynamics CRM 3.0, and within two months the company began using its new technology.

Benefits

Today, all of AbeTech's data is connected with its customer relations process, from lead tracking through a closed sale and into customer services connected through Microsoft Dynamics CRM 3.0. When a lead is generated, it is entered into CRM and assigned by a sales manager, who can see the status of every lead he or she distributed.

Account managers convert leads to opportunities in the system, easily developing quotes, and converting those quotes to orders electronically.

Orders also are submitted to Microsoft Dynamics GP 9.0 electronically. Account managers are responsible for submitting orders, placing them in a queue in the CRM system. Each order is distributed from CRM

to customer service representatives, who complete additional information and submit the order to the accounting system.

Orders and invoices are then integrated with the accounting system in a manner that allows the account manager to check order status in the CRM system throughout the process. An easy to select automated workflow tool even sends an e-mail to thank the customer after the order is confirmed.

An additional benefit, the integrated system enables AbeTech's marketing department to pull lists from the CRM system for its e-mail newsletter and other campaigns. Since the initial integration has been so successful, AbeTech continues to connect its CRM system to more of its processes, including project tracking and part number requests. With this enhanced connectivity, the company can eliminate the multiple documents and databases it had compiled previously to house data.

As a result of this transformation, AbeTech has benefited from significantly reduced costs. The time required to enter data was cut in half, as the need for duplicate entries in separate databases was eliminated. IT additionally saved numerous hours as it no longer needs to review data each month to ensure the company has accurate records.