



Microsoft Dynamics Customer Solution Case Study



Solution Overview

Country: New Zealand

Industry: Exhibition Display

Customer Profile

Headquartered in Auckland, New Zealand, Exhibit Group is one of the country's leading exhibition solutions providers. Offering portable display solutions ranging from pop-up displays, pull-up banners, pedestals to brochure holders and accessories, the company employs 21 staff.

Business Situation

Exhibit Group needed a centralized customer and events database to enhance inter-department collaboration. It also wanted to establish a process-driven operation to streamline sales processes and shorten the quotation-to-sales order cycle.

Solution

Exhibit Group implemented Microsoft Dynamics™ CRM and successfully established a centralized customer contact, accounts history, event database and massively improved their customer service.

Benefits

- Established consistent sales processes
- Streamlined quotation-to-sales order cycle
- Enhanced customer knowledge and value-add
- Improved customer service
- Enhanced management visibility
- Increased sales management
- Improved sales productivity

Exhibition Solutions Provider Maintains Market Leadership with Enhanced Customer Knowledge and Increased Sales Productivity

“By reducing the amount of administrative tasks for our sales consultants with Microsoft Dynamics CRM, our aim is to increase our face-to-face customer sales calls by around 40 percent, which should help us achieve our target of 12 percent year-on-year growth without adding more sales consultants.”

-- Mr Craig Joynt, Managing Director, Exhibit Group

The Exhibit Group is a market leader offering portable exhibition display solutions across New Zealand, including pop-up displays, pull-up banners, pedestals, brochure holders and accessories. To better serve its customers, streamline sales processes and shorten quotation-to-sales order cycle, the company wanted to setup a centralized customer database with a customer relationship management (CRM) system. Previously, without consistent workflows or system to track customer and account history, its management lacked visibility into the status of sales opportunities.

Microsoft Dynamics™ CRM helps Exhibit Group gain a clear view of its customers from first contact to post-sales. With consistent sales processes, sales management has been enhanced, resulting in greater sales productivity. Management visibility has also been enhanced with better customer knowledge.





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Mr Craig Joynt
Managing Director
Exhibit Group

Situation

With more than 27 years' experience in the exhibition display business, the Auckland-based Exhibit Group has established itself as a market leader offering innovative display solutions across New Zealand. With offices in Auckland, Wellington and Christchurch, the company provides portable display solutions ranging from pop-up displays, pull-up banners, pedestals to brochure holders and accessories. Backed by its expert knowledge, Exhibit Group delivers an end-to-end solution with its Display Management and Graphic Design Services. The company employs 21 staff.

Focused on helping its customers achieve a “visual advantage” that “maximizes success” with “measurable outcomes” at events they participate in, the company places vital importance on knowing their customers and their business needs. According to Craig Joynt, Managing Director, Exhibit Group, success and staying ahead of the competition in the industry boils down to “how well we know our customers so we can deliver exceptional service.” In fact, “the more we know about our customers, the better”.

To know its customers more intimately, the management knew it was imperative to address the company's lack of a standard system for tracking customer contact data and account history. “Without a process-driven operation, our sales consultants were spending up to 50 percent of their time on administrative tasks instead of selling. Important information such

as customer contact details and events information were stored disparately, making it difficult to locate and share information effectively between the various departments. This also made it difficult to offer great customer service,” explained Craig.

Without a consistent workflow around lead management, the Exhibit Group management did not have full visibility into the actual amount of opportunities in the pipeline. There was also no proper documentation to record how these opportunities were progressing through the pipeline.

To maintain its market leadership, the Exhibit Group management wanted to implement an integrated customer relationship management (CRM) system that would streamline its sales, marketing and customer service processes and create a clear view of its customers from first contact through purchase and post-sales.

Solution

One way to ensure success for its CRM implementation was to look for a user-friendly system that offered high usability and encouraged user adoption. “User uptake was poor for our previous system, this exacerbated the issue of unreliable and incomplete data capturing. We realized that, regardless of the system selected, if the staff did not feel comfortable using it as part of their daily work flow, it was a wasted resource and one which would cause endless frustration for those trying to meet clients needs with only part of the picture. User adoption was



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Managing Director
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absolutely critical to the success of our CRM implementation,” said Craig.

Using the new CRM system, Craig and his management team also wanted to establish consistency in business and operational processes, enhance visibility of sales and marketing efforts and enable accurate analysis of results. The system needed to be reliable, backed by a reputable brand name and most importantly, deliver return on investment (ROI) by streamlining processes, creating more face-to-face time with customers and driving new sales.

After a detailed evaluation, Exhibit Group selected Microsoft Dynamics™ CRM for these reasons, “Microsoft Dynamics CRM came out ahead of the others we looked at due to its comprehensive choice of functions and ease of use. As many of our users were already competent with Microsoft solutions, the tight integration between Microsoft Dynamics CRM and Microsoft® Office Outlook® tipped the scale in Microsoft’s favour. With the Microsoft brand name, we also felt confident that we could expect better long-term support and future development plans with Microsoft Dynamics CRM,” said Craig.

With the help of OA Systems Limited (OA Systems), a Microsoft® Certified Partner and Microsoft® CRM Certified Software Advisor, Exhibit Group also successfully customized several functions around the Opportunity and Quote modules to enable a closer fit to

the company’s business processes, and the ways it communicates with its customers.

Pleased with the new system which went live in October 2007, Craig credits OA Systems for the successful implementation. “OA Systems provided an excellent level of support and service throughout our Microsoft Dynamics CRM implementation. They have a well-rounded understanding of our business and demonstrated expertise in knowing how CRM can benefit any situation. They were fundamental to the success of this implementation and helped us get the system up and running within budget,” said Craig.

Benefits

With Microsoft Dynamics CRM, Exhibit Group benefited from streamlined sales processes which in turn increased sales productivity. By setting up a centralized customer contacts, accounts history and events database, inter-departmental collaboration has been enhanced. With full management visibility into sales activity and pipeline, sales management is now more effective and enables faster decision-making.

Established Consistent Sales Processes

Prior to Microsoft Dynamics CRM, Exhibit Group sales consultants were spending up to 50 percent of their time on administrative tasks, as customer contacts were stored disparately and there was a lack of consistent business processes to guide how things were done. “Exhibit Group’s aim is to reduce



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this to 35 percent and more in the future. So far, we have already seen an increase in sales productivity, and are achieving previous sales levels with three less front-line sales staff,” said Craig.

He added, “By reducing the amount of administrative tasks for our sales consultants, we aim to increase our face-to-face customer sales calls by around 40 percent, which should help us achieve our target of 12 percent year-on-year growth without adding more sales consultants. Job satisfaction has also been increased as no sales consultant I know enjoys doing administration, but they love giving great service and being able to close the sale. With Microsoft Dynamics CRM, we have given them better tools to get the job done.”

Streamlined Quotation-to-Sales Order Cycle

The Quotation-to-Sales Order cycle has also been reduced with Microsoft Dynamics CRM. With the new system, Exhibit Group is able to generate four different reports to accompany each customer quotation, each detailing varied levels of information regarding the customer’s product selection. With the help of OA Systems, customizations have been made to cater for lengthy descriptions of the product selections, rental specifications and to capture other information such as production date, shipping deadlines and hire to/from dates.

For businesses fulfilled via Exhibit Group’s agents, order forms have also been customized to include a

link to the agents if the deal is closed via a third-party. This provides valuable information to the Exhibit Group sales consultants when they need to trace information which agents are helping to bring in or fulfil.

Enhanced Customer Knowledge and Value-Add

Unlike previously, where customer contacts information either resided in the business accounting package or was held on paper files by the respective sales consultants, Microsoft Dynamics CRM has enabled Exhibit Group to create an integrated database with all customer-related information including: contacts, proposals, quotations and account history.

With a centralized customer contact database, time is no longer wasted trying to locate the right person to talk to. Human errors due to double-handling and duplicate documentation are also reduced. With all client proposals and quotations centralized in one system, it is now easily accessible by others in the company.

“The centralized quotation and account history database helps to ensure “business continuity”, regardless of the sales consultants handling the customer’s account. When a sales consultant goes on leave or has left the company, we do not have to worry about locating where the client proposals and quotations are stored. Staff can focus on delivering better service to customers,” said Craig.

He added, “Even when there is a



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personnel change at the customer’s end, we are still able to demonstrate value and knowledge of the customer’s preferences by sharing with them past proposals, including their exhibition display specifications for previous events,” said Craig.

With the new system, Exhibit Group now maintains a tradeshow database which holds comprehensive information regarding events held throughout the year such as venues, dates, organizers, the target industries and participants. This information enables them to add value to their customers by sharing information on potential events they may want to participate in, as part of their go-to-market initiatives.

Enhanced Management Visibility

Without an integrated CRM system and a proper workflow to guide the lead management process, the Exhibit Group sales consultants used to manage business opportunities manually via paper filing systems and customer appointments using handwritten diaries. Opportunities often fell through the cracks due to inadequate reporting to manage the sales pipeline.

The familiar Windows-based interface of Microsoft Dynamics CRM and its tight integration with Microsoft Office Outlook ensured quick uptake by the sales team after a brief training. “In only three months, we have been able to gather substantial and meaningful data in the form of reports and customer information. With Microsoft Dynamics CRM, the management team now enjoys a bird’s eye view of all sales opportunities,” said Craig.

He added, “With valuable data to help us identify sales opportunities, we now avoid wasting time and effort chasing after opportunities that are not going to materialize. Microsoft Dynamics CRM gives us the ability to better understand the needs of our customers. Management is now empowered to steer the sales efforts to achieve higher closure rates.” Marketing efforts have also been enhanced, thanks to the Tradeshow Attendee entity customized by OA Systems. Using this functionality, the Exhibit Group is able to track tradeshow participants, where their stand is located, which industry they belong to and even budget information.

“The ability to capture such valuable information within Microsoft Dynamics CRM empowers our marketing department to design marketing campaigns to target specific business sectors and gather new sales leads. It also creates inroads into existing tradeshow attendees which may require help with re-designing booth displays or purchasing of additional equipment,” said Craig.

Increased Sales Management

By enabling sales consultants to create and maintain a single view of customers and all sales opportunities, Microsoft Dynamics CRM streamlines and automates sales processes to shorten sales cycles and improve customer retention.

With the Sales Portal developed by OA Systems that is tightly integrated with Microsoft Dynamics CRM, sales consultants now have complete visibility into their current sales

About Microsoft Dynamics™

Microsoft Dynamics™ is a line of financial, customer relationship and supply chain management solutions that help businesses work more effectively. Delivered through a network of channel partners providing specialised services, these integrated, adaptable business management solutions work like and with familiar Microsoft software to streamline processes across an entire business.

For More Information

For more information on Microsoft Dynamics, visit Microsoft www.microsoft.co.nz/dynamics or email: askdynnz@microsoft.co.nz

For more information about OA Systems Limited, call 64 9 522 2370, visit www.oasystems.co.nz or email: info@oasystems.co.nz

For more information about Exhibit Group, call 64 9 570 6060, visit www.exhibit.co.nz or email: info@exhibit.co.nz

situation. They have the capabilities to drill down their sales figures based on categories such as budget year-to-date, sales year-to-date, the number of quotations for a certain month etc. With a comprehensive tool to manage their sales opportunities, sales forecasting is now more accurate.

To enable better follow-up, OA Systems also helped customize Automated Workflows to send reminders to the sales consultants after the closure of each sales opportunity, and again, after a specified period. Once the invoice is generated for each closed deal via a third-party accounting system, a copy is attached to the relevant account within Microsoft Dynamics CRM. This provides sales consultants with historical data to assist with future sales opportunities with customers. "Previously this information had to be requested from the accounts department, so this feature has definitely allowed our sales consultants to be more proactive in managing their sales opportunities," said Craig.

Craig commented, "The biggest benefit we have gained from Microsoft Dynamics CRM is enhanced sales management. As an effective sales management tool, it gives our sales consultants real-

time access to customer data and account history online, so they can work smarter, deliver greater value to customers and close more sales in less time."

Inter-department collaboration has also been enhanced, as Microsoft Dynamics CRM offers greater transparency for all customer related interactions, enabling Exhibit Group sales consultants to better service national accounts and collaborate with team members located in its branch offices across the country.

Sharpening Strategies for Faster Growth

"Investing in Microsoft Dynamics CRM is one of the most important business decisions we have made. It has sharpened our insights and empowered us to devise more astute strategies to deliver greater value to customers. In addition to this, we have been able to quickly deliver a return-on-investment to our owners with enhanced sales efficiency," said Craig.

Looking ahead, there are plans to integrate the company's web site functionality with Microsoft Dynamics CRM to empower sales and marketing efforts to build new sales opportunities.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM
- Microsoft Office
 - Microsoft Office 2003
- Microsoft Windows Server System
 - Microsoft SQL Server 2005 Service Pack 2

- Microsoft Exchange 2003 Service Pack 2

Hardware

- Hewlett-Packard

Partner

- OA Systems Limited

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