



Microsoft Dynamics Customer Solution Case Study



Packaging Company Gains \$1 Million in Sales to Smaller Accounts with CRM Solution

Overview

Country or Region: Australia
Industry: Manufacturing, Packaging

Customer Profile

Aspect Packaging manufactures packaging and shipping supplies for customers in the automotive, electronics, and manufacturing industries throughout Australia.

Business Situation

Aspect Packaging was tracking—on paper—orders and sales opportunities for its 2,000 customers. Without a better way to manage customer relationships, delays and lost sales occurred.

Solution

Aspect Packaging installed Microsoft® CRM. Within a week, the entire sales force was entering customer and order data into the system, giving the company powerful tracking and reporting tools.

Benefits

- Orders from small customers grew by AUD\$1 million
- Valuable data from mobile users captured
- Better insight, control of operations for managers

“Now, an inquiry gets logged into the system, and someone’s got to deal with it. We don’t lose that business anymore. It’s probably a gain of about 1 (AUD) million dollars a year for us.”

Brett Lynch, Chief Financial Officer, Aspect Packaging

Aspect Packaging customers rely on it for help with shipping everything from auto and electronics parts to customized livestock pens for air and sea transport. The Australian company has five locations and more than AUD\$30 million in sales. However, sales staff had been recording all sales leads and customer information on unrelated spreadsheets. Updates and follow-up notes were written on paper or never written down at all. With 2,000 customers, potential business was being lost because sales staff was unable to effectively follow up from piecemeal information. Now, with a Microsoft® CRM system (now part of Microsoft Dynamics™), all information about a customer’s needs, orders, and inquiries can be recorded and, in seconds, can be retrieved and flagged for timely follow-up action. Within the first year with the new system, the company gained more than AUD\$1 million in business.

“We can see where an existing customer might be getting ready for another project, or when it’s time to follow up on a previous conversation. That keeps us from losing business we might have missed.”

Brett Lynch, Chief Financial Officer, Aspect Packaging

Situation

Aspect Packaging manufactures and distributes packaging supplies for a wide variety of manufacturers throughout Australia. Aspect Packaging’s customers rely on the company for help with safely and efficiently shipping products from auto and electronics parts to customized livestock pens for air and sea transport. With seven different product lines, from wooden pallets to polyurethane inserts, Aspect Packaging’s products can fulfill a customer’s specialized shipping or distribution needs.

Aspect Packaging’s staff includes engineers who run specialized manufacturing equipment and creative staff who coordinate the design and overall appearance of product packages with a customer’s branding strategy. The company, which operates in five locations in Australia, generated revenue of more than AUD\$30 million in 2004.

The company had grown significantly since its beginning in 1981, but the tools and systems to support that growth had not kept up. Brett Lynch, the company’s Chief Financial Officer, says that to keep track of inquiries or orders from customers, the company’s 10 sales people had been relying on Microsoft® Excel® spreadsheet software, but were updating data mostly on paper notes. “We knew we were losing business. Our sales activities were informal and undocumented. We knew we were missing opportunities for sales because they weren’t followed up—or followed up on time.”

Lynch estimated that, under the old system, only about 50 of the largest of their approximately 2,000 customers received consistent attention, and the remaining, smaller accounts were not being covered as well as they should have been.

Solution

Aspect Packaging knew it needed to do a better job of tracking interactions with all its customers, not only the 50 largest. Aspect Packaging contracted with JayThom Consulting, a Microsoft Certified Partner specializing in customer relationship management (CRM). Aspect was evaluating building their own internal CRM system when Brett Yorgey of JayThom suggested they consider Microsoft CRM from the Microsoft Business Solutions suite of products. Yorgey had installed Microsoft CRM in his own business and knew the product was both powerful enough to meet Aspect’s needs and easy to use.

Lynch listened to Yorgey and decided to apply the Microsoft solution. Yorgey and a team from JayThom installed Microsoft CRM on a server running Microsoft Windows® Small Business Server 2003 at the Aspect Packaging head office in Melbourne. This choice gave the company a powerful network solution and access to the power of Microsoft Exchange Server and Microsoft SQL Server™ 2000, all in an easily installed, easily managed package.

The implementation went smoothly and was completed within a week, according to Yorgey, and his team had little trouble importing Aspect customer data from spreadsheets and a few Microsoft Access databases. “We had the system running on the first day; the rest of the week we spent working out a few bugs and refining the configuration,” Yorgey elaborates.

With Microsoft Office 2003 on all the sales team’s desktops, learning to use the new system was highly intuitive. “The ease of use of the Microsoft CRM solution was the convincing factor,” Lynch says. “Because the look and feel is based on Microsoft products (like Word, Excel, or Outlook® [collaboration and messaging client]) that people use every

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Brett Lynch, Chief Financial Officer, Aspect Packaging

day, people understood how to use Microsoft CRM from the start. We just had to show them the general principles of the system, and the sales force figured out for themselves what they had to do for their specific tasks or duties.”

Yorgey attributes the smooth and effective implementation to the solution’s ease of use. “In some implementations, you’ll have a couple of key people working on the project, and they’ll understand how to do everything, but the rest of the team doesn’t know what to do. Here, all 10 people on the sales team were using CRM from the first week.”

Now, all 10 Aspect salespeople and a team of customer service reps use the system daily, logging about 100 transactions a day for the company’s base of about 2,000 customers.

Benefits

With the new CRM system, the Aspect Packaging sales team tracks opportunities or inquiries from customers in a familiar desktop environment. The information is available throughout the company, and the company is gaining business that used to slip away as a result of being recorded only on paper.

Orders from Smaller Accounts Grow By \$1 Million

The most important benefit that Lynch discovered after implementing Microsoft CRM was that his company was no longer losing business because of missing or misplaced paperwork. Without adding any sales staff, Aspect Packaging is converting a significant number of leads and opportunities that might have fallen through the cracks without the new CRM system.

“Before our new system, when an order or inquiry would come in, it would have been a piece of paper on someone’s desk; or worse, it might never have been written down at all.

Now, an inquiry gets logged into the system, and someone’s got to deal with it. We don’t lose that business anymore. It’s probably a gain of about 1 (AUD) million dollars a year for us,” he says.

Valuable Data from Mobile Users Captured

Aspect Packaging uses CRM Mobile, the extension of the software designed for handheld devices. “Our sales force calls on people in automotive or electronics—or just about anyone in manufacturing,” Lynch says. The sales reps log the details of the potential or existing client and, later, synchronize the data back into the corporate system. “Some of the sales staff log the details at the end of every call; some do it at the end of the day. But the key is they’re not writing it down on a piece of paper. They’re plugging it directly into our corporate CRM system.

“The result is that sales managers and senior managers can view the results of these calls on a regular basis, and we can see what’s going on, day by day, in terms of the potential revenue they’re chasing,” Lynch says.

Better Insight, Control of Operations for Managers

Without the CRM system, there would be no way to even estimate the value of the inquiries or opportunities that sales people have received, Lynch believes. Today, with Microsoft CRM, Aspect Packaging tracks about AUD\$10 million in orders or inquiries. If any orders or inquiries listed on the system need attention or follow-up action, sales managers or executives at Aspect can see them quickly and take appropriate action.

In addition, Microsoft CRM produces weekly and monthly reports that give managers a summary view of company operations, another capability that didn’t exist before the Microsoft CRM system was put in place. These reports help executives estimate future

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demand and help make long-range planning more accurate.

Lynch describes his company's Microsoft CRM solution as "self-correcting," in that any member of the sales team or any sales manager can see an outstanding item and then can collect and examine all of a client's transactions.

"We can see where an existing customer might be getting ready for another project or when it's time to follow up on a previous conversation. That keeps us from losing business that we might have missed," he says.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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