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BUSINESS TO THE NEXT LEVEL**



POWEROBJECTS
Bringing Microsoft Dynamics CRM into **FOCUS**

Winsor Learning INC. 

Winsor Learning Improves Operations and Strengthens Sales and Customer Support with Microsoft Dynamics CRM

Company

Based in St. Paul, Minnesota, Winsor Learning, Inc. provides instructional reading-based materials and consulting services to PreK-12 school districts and schools across the country. In order to keep up with growth and more effectively support the sales, service and operational components of its business, the company implemented hosted Microsoft Dynamics CRM.

Situation

Winsor Learning is a diverse organization with staff located in several locations across the U.S. with some working from remote offices. Before the implementation of Microsoft Dynamics CRM, the sales and service teams would need to login into a web-based Citrix system to access files and forms to process orders and serve its customers. And, for remote users, accessing the Citrix-based system became very slow and difficult to use.

The company was also using ACT!, a contact management system, which did not integrate very well with other applications within the organization, making it difficult to get the information they needed to efficiently run their business. "Both the sales and services organizations had processes in place but it was not easily automated and would sometimes take hours for the data to sync up. We also lacked a way to quickly and easily communicate with one another about what new projects had been won and when and how services would come into play," said Tom Guyer, president of Winsor Learning. "It became apparent that we needed a CRM solution that would help centralize and automate our business from start-to-finish including sales, service, and operations. We looked at other systems but felt Microsoft Dynamics CRM fit our needs the best and would adapt to our business needs in the future," he added.

Solution

Winsor Learning looked to leading Microsoft Dynamics CRM partner, PowerObjects, to implement a hosted CRM solution.

"PowerObjects came in and took the time to understand our needs. They were able to show us how the system would help our business and get us to where we needed to be," said Guyer. "The PowerObjects team was very knowledgeable

Challenge:

As a reading intervention and educational consulting organization, Winsor Learning, Inc. provides instructional materials and consulting services to PreK-12 school districts and schools across the country. In order to help to respond to the growth the company was experiencing, they needed a more robust, integrated and user-friendly CRM solution to better manage its sales, service and operational components of its business.

Solution:

PowerObjects implemented a hosted Microsoft Dynamics CRM solution for Winsor Learning across the entire organization including management, operations, sales and customer service.

Benefits:

With Microsoft Dynamics CRM, hosted by PowerObjects, Winsor Learning has increased efficiency and communication across the entire organization, provided greater operational visibility into business functions and created a strong organizational platform for future growth opportunities.

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about CRM and understood the product very well. They were very responsive to our needs and now that we have CRM running and everyone trained on the system, we are very pleased," he added.

As a value-add in working with PowerObjects, Winsor Learning received PowerObject's PowerPack modules free of charge. These modules, PowerEmail, PowerDashboard, PowerSurvey, PowerView, PowerEdit, and PowerFax, extend and enhance the functionality of CRM for the company.

Key Benefits

One of the greatest benefits the company realized with the new solution was the ability for all the staff, including those working remotely, to access a centralized database of information quickly and easily. "Before CRM, our staff had trouble accessing the information they needed to do their jobs. Now that we have all of the sales and customer information in one centralized database that we can access in real-time, we can focus on building new business and servicing our customers even better," said Guyer.

PowerObjects also integrated CRM into Microsoft SharePoint portal, and now the company has the ability to access and share information and data across the organization more easily. "The new CRM system along with the collaboration capabilities of SharePoint has greatly enhanced and improved communication and teamwork between our sales and services organizations," he added.

From a sales perspective, Winsor Learning now has the ability to view sales pipeline reports quickly and easily. "Before we'd spend a couple of days gathering the data and now we can pull the report in minutes," said Guyer. "It's made us much more effective in our sales efforts and has allowed us to get the information we needed to quickly analyze our sales performance and make adjustments as needed."

The customer service teams have also improved their ability to capture and report on project status. With hosted Microsoft Dynamics CRM and workflows in place, the company has the visibility and project management capabilities to track projects, assign tasks and check on status at anytime from anywhere. "When our teams would conduct a client review, it used to take up to five days to collect and report on all the information. Now with CRM, we can gather the information we need and prepare the materials in half the time," he added.

About PowerObjects

PowerObjects is a recognized leader in delivering Microsoft Dynamics CRM/xRM solutions to customers in a variety of industries. As a Microsoft Gold Certified Partner with numerous CRM/xRM projects under our belt, we combine the right focus, with the right people and the right processes to bring value to every organization we work with. As Microsoft Dynamics CRM as their core focus, PowerObjects can handle everything from standard implementations to creating a complex line of business applications using CRM as an "xRM" platform. PowerObjects can offer a solution that fits your organization including Hosted CRM, On-Premise CRM or xRM solutions.

For more information, visit www.powerobjects.com or call 612-339-3355.

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