

SOLUTION STORY

BACKGROUND

This customer is one of the largest wholesale distributors of residential and commercial plumbing, lighting, and bathroom fixture supplies in the U.S. They have 1,350 locations (including warehouses, showrooms, etc.) and over 19,000 employees. They serve customers in all 50 U.S. states, Puerto Rico, the Caribbean, and Mexico.

CHALLENGE

Previously, the customer was not utilizing an enterprise CRM system. Some of the departments within the organization were using Salesforce.com but the user adoption was poor and the implementation of Salesforce.com failed. PowerObjects engaged with the customer to validate their CRM roadmap and were chosen to implement Phase I, which would include a solution for their hospitality facilities and maintenance (HFM) teams. The customer wanted to utilize CRM's sales features along with a CTI integration for their call center (NSC). Their call center includes over 120 seats/users of CRM, which the customer planned to slowly roll out across the organization with a focus on the sales features.

PowerObjects went through a rigorous selection process through the RFP provided by the customer and beat out the competition because of our proven capabilities in customizing Microsoft Dynamics CRM. After choosing PowerObjects for Phase I of their CRM solution, PowerObjects was selected for yet another project for additional support functionality.

SOLUTION

This project, including the Plan for Success phase, took PowerObjects six months to implement and deploy. The customer also has three integrations with CRM. These include a home-grown ERP system integrated through web services and an ActiveX bridge, Cognos (a Dynamic URL integration), and a Cisco phone system (for CTI). Apart from the integration, there was also a large amount of data migrated from their ERP and previous Salesforce.com systems into CRM. PowerObjects used SSIS for this data migration.

PowerObjects also was asked to create various custom entities including a custom search. The custom search needed to be an enterprise-ready search tool that would allow the customer to define the scope of the search results by Business Unit. We created a customer quick activity for outside sales mobile efficiency as well as a Cognos report integration that was displayed on dashboards and forms.

BENEFITS

The customer also uses PowerPhone to help identify customers when they call in and easily allows the representative to view past orders, order patterns, and more. With PowerPhone, the customer now has real-time access to Orders, Cash Sales, Purchase History, etc. through a web services integration with their Operational Data Store (ODS).

Additionally, they utilize SSIS packages to keep Accounts, Jobs, Vendors, and other information up to date with ODS through staging tables. They also use the lead and opportunity entities for coding and customization to meet basic sales

PLUMBING AND
LIGHTING DISTRIBUTOR
IMPLEMENTS CRM FOR
ITS ROBUST AND
CUSTOMIZABLE SALES
FEATURES

AWARDS + RECOGNITION

2012 + 2013 + 2015
Microsoft Dynamics Partner
of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft
Dynamics

+++

2009 + 2010 + 2011 + 2012
Inner Circle for Microsoft
Dynamics

+++

3
Convergence Customer
Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft
Dynamics

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BENEFITS | CONTINUED |

processes. CRM links to their ERP system (Trilogie). From there, the user can click on various buttons in CRM to be navigated to the relevant screen in Trilogie.

In the future, the customer plans on leveraging the Marketing and Service features within CRM.



ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life sciences, insurance, financial services, publishing, distribution, manufacturing and professional services.



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