SOLUTION STORY

HEARING TECHNOLOGY COMPANY IMPLEMENTS MICROSOFT DYNAMICS CRM TO MANAGE THEIR LEAD GENERATION PROCESS

BACKGROUND

This customer is a leader in hearing solutions.

CHALLENGE

This customer decided to implement Microsoft Dynamics CRM to manage their lead generation processes. Processes included the acquisition of new customer leads, scheduling of appointments, and the conversion of appointments to sales as indicated through self-reporting from the customer.

SOLUTION

In addition to the implementation of Microsoft Dynamics CRM to support these processes, two portals were developed to collect and store external interactions. A customer portal was implemented to support the inbound call processes of both the internal call center and the outsourced overflow call center. The portal collects consumer contact and qualification information; determines the location nearest to the customer; allows the call center to request information and schedule a follow up; allows the call center to schedule an appointment for the customer; and transfers the customer to a different location. By utilizing the customer portal, dealers are able to log in and communicate the status of their sales efforts, update the disposition of an appointment, add new appointments, add a sale, and view a company profile including open office hours, locations, and contacts at each location.

Tracking ROI was important for this customer, and in order for them to track the ROI for various marketing efforts, a structure in CRM was created to tie information from the originating campaign and the campaign activity to the response, appointment, and eventual sale. In order to support this, PowerObjects configured their system with customers, customer locations, contacts, campaigns, opportunities, follow-up activities, and fulfillment. Now, customers in CRM are stored as Accounts with a relationship type of Customer. Accounts may also be used to track other companies. Each Account represents a single location where services are rendered, and should the customer have multiple locations, a hierarchy is in place that uses the parent account and sub-account relationships on the Account record.

Additionally, a campaign can be set up to track one or more outbound efforts grouped together under the same name and budget and may also be set up to track one or more inbound channels. In addition to inquiries coming in from phone and internet sources, new leads may be added to CRM by importing lists. The out-of-the-box import tool is used to import lists and duplicate detection rules can be applied to lists upon import to keep the data clean. Standard mappings can be saved and reused for similar imports.

Campaign activities are used to measure ROI and record the response channel for the campaign. This means that each campaign must have at least one campaign activity in order to gauge ROI by response channel. Regardless of whether the campaign is outbound or inbound, the cost and results of the campaign are tracked in CRM. The cost is stored on the campaign activity and totaled on the campaign. Now, when a response comes in from that channel, it is recorded against the campaign activity so that the success of that channel and the cam-

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2011 + 2013 + 2014
Inner Circle for Microsoft Dynamics

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SOLUTION |CONTINUED|

paign can be calculated. Any additional literature fulfillment or phone calls are recorded against the response.

Whenever a campaign activity is responded to, an opportunity can be generated from that response that includes the inquiry, appointment, and sale. The inquiry gives insight into where the request came from (campaign, campaign activity, etc.). When an appointment is created, it is initially assigned to "Unassigned C Contact." When the appointment is scheduled, the opportunity will be assigned to the correct customer. Lastly, a sale may be attributed to a campaign activity and all associated information that was gathered along the way will stick with that account.

A customer activity was created in CRM named "Fulfillment" which indicates that literature has been requested and a status on that activity indicates whether the request has been fulfilled or not. The benefit of this design is that fulfillment activities will be displayed on the history of an opportunity and also on the history for the contact.

Fulfillment activities can be generated automatically after the call center enters them in the portal or manually from the CRM interface. After the activity is generated, a workflow takes the necessary action based on whether something needs to be emailed or put on a list to be sent through an outside vendor. As part of the literature fulfillment process, a nightly script runs to collect requests that need to be mailed and places them on a site for the vendor to pick up.

BENEFITS

A big part of this customer's CRM implementation was a call center. They initially utilized an outsourced call center, but when implementing CRM, they decided to move to an internal call center that would be the first line of response for taking calls. They have two groups in their call center, internal employees and the outsourced group that operates at the overflow call center. By utilizing two groups, they have 24-hour call center coverage.

Inbound calls are routed via inbound call portals, dealer locaters, and customer portals. The inbound portal is the primary interface by which call center employees mange incoming calls. The dealer locator stands alone but is also accessible within the portal. The dealer locator can be used in conjunction with CRM and allows users to select a location and schedule a dealer. The customer portal allows customers to update the status of an appointment via the portal. You can also view a list of appointments that have been scheduled for the customer and a list of previous leads or sales.

Outbound calls are used to follow-up with customers after a literature request, appointment requests, specific campaigns, etc. Whenever outbound calls are required, employees may reference CRM activities to view calls and to navigate to the contact or opportunity record associated with a phone call. Employees can easily view their dashboard homepage, which contains their scheduled activities, open appointments, and any past calls. This customer has seen great success with Dynamics CRM and PowerObjects.

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 scienes, insurance, financial services, publishing, distribution, manufacturing and professional services.

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