



Integrated CRM Solution Helps Trek Support Local Sales Reps

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David Peterson, Enterprise Collaboration Manager, Trek

Trek believes in bicycles. The company sees the bicycle as a simple solution to challenges as complex as climate change, urban congestion, and human fitness. Founded in 1976 in Waterloo, Wisconsin, the company has grown into a top designer and maker of high-end bikes, which it sells through independent specialty bicycle shops worldwide.

Results

- Increase adoption among outside sales reps
- Provide a complete view into customer and account information
- Improve efficiency of support teams
- Promote consistent global processes

Industry

Manufacturing and Distribution

Country or Region

United States

Customer Size

1,200 employees

Number of Users

190 employees

Connect with Trek Bicycles



<http://www.trekbikes.com/>

Although it's a global leader in bicycles and related gear, Trek Bicycles maintains the spirit of a small company, from its close-knit, collaborative staff to the independent bike shops who sell Trek bikes and gear. Because it sells through a network of smaller, independently owned retailers rather than big-box sporting goods stores, Trek's success depends on close, supportive relationships between its local sales reps and the owners of the stores.

Because these trusted partnerships are the backbone of Trek's business model, when an outside sales rep leaves or retires, it can take years to rebuild the rapport and depth of knowledge that the rep had established with the bike shops in his or her territory. To mitigate some of this risk—and to maintain continuity for the local shop owners—Trek sought a customer relationship management (CRM) system that could capture and retain account histories for distributors and retailers.

The company deployed Microsoft Dynamics CRM Online in March 2011, but many sales reps were reluctant to spend additional time entering data into the CRM system, and adoption of the new system was poor. When David Peterson, Enterprise Collaboration Manager, took over Trek's CRM initiative, his goal was to find ways for the application to deliver real value to the sales reps, rather than simply add to their workload.

Peterson re-envisioned CRM not just as a means to collect data about Trek's retailers and consumers, but as a tool that would help people communicate, collaborate, and achieve their goals. His efforts have focused on building connections between people, processes, and information, using Microsoft Dynamics CRM Online as a hub.

Peterson has a vision of CRM as a "one-stop-shop" for information. "We want to get to a point where every retailer and rider interaction that Trek has is tracked and catalogued in CRM," he explains. "That's a pretty lofty goal for a global company."

Integration between Microsoft Dynamics CRM Online and other enterprise data sources, including Trek's JDE ERP system, has helped develop a more complete picture of Trek's dealers and customers, while the introduction of Yammer has enabled people to collaborate within Microsoft Dynamics CRM Online—replacing email and instant messaging for certain workgroups.

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David Peterson, Enterprise Collaboration Manager, Trek

Sales With account histories, financial data, and inventory aggregated in Microsoft Dynamics CRM Online, sales reps now use the system to prepare for meetings. Presenting all relevant information in one place saves reps valuable time, and encourages them to engage with the solution. They now log event reports and weekly updates that had previously been transmitted by email, ensuring the information is accessible to everyone.

Saving even a few minutes each day has improved acceptance of Microsoft Dynamics CRM Online among the sales reps. "We're trying to save people just a little time," Peterson explains. "If we can shave off a few clicks here and there, or save people from clicking through multiple screens, they will appreciate it. And over time, that's going to add up to big savings."

Customer Support The ability to surface data from ERP and other systems in Microsoft Dynamics CRM Online has made the solution valuable to support teams, as well. For example, to track service and repairs (every bike Trek sells is warranted for life), the system pulls product registration data from a separate database, matches it with case numbers and warrantee information from JDE, and displays customer and dealer data associated with that bike in CRM. As a result, technicians have a complete history of the bike, the problem it has, where it's being fixed, and who owns it, all in one view.

Trek has also connected Microsoft Dynamics CRM Online to its public website, where the system captures customer inquiries from a web form and routes them to the appropriate technical representative. The automated workflow attached to these forms has reduced response times from two weeks to only a few hours.

Internal Collaboration With Yammer feeds embedded in Microsoft Dynamics CRM, teams share ideas, collaborate on projects, and make decisions more quickly. "All of a sudden it was like, *boom*—all of this information is all in the open, transparent," says Steve Novoselac, Trek's business intelligence and .NET development manager, referring to his development team's initial experience with Yammer. "Things were getting done because everyone had a new kind of awareness of what was going on in the group."

Global Consistency Looking ahead, Trek anticipates that Microsoft Dynamics CRM Online will play an important role in Trek's initiative to standardize operations among its global subsidiaries. "There's a push to be more consistent across job roles globally," Peterson says. "We expect to roll out standard processes and workflows through Microsoft Dynamics CRM Online and make them available to everyone. Because the tools are browser-based, we won't need to worry about localizing the tools; we can take the system global very quickly."

Next Steps

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