



Replacing CRM System Generates Large Savings And New Efficiencies for Green Company

Overview

Country or Region: United States, Canada, Puerto Rico

Industry: Oil and gas—Oil refining industry; Process manufacturing; Professional services

Customer Profile

Safety-Kleen Systems provides cleaning equipment and products and performs oil collection and re-refinery, waste management, and other services to help companies succeed in their sustainability efforts.

Business Situation

Safety-Kleen Systems wanted to help its field sales team work more efficiently, give employees access to critical information, reduce technology-related costs, and streamline the technology environment.

Solution

The company implemented Microsoft Dynamics CRM as its customer relationship management solution to replace Salesforce.com and integrated it with key software tools already in place.

Benefits

- Save more than \$500,000 annually
- Develop more valuable customer engagements
- Manage an efficient, productive sales operation
- Facilitate business insight and smart decision making

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Carla Rolinc, VP of IT, Safety-Kleen Systems

Safety-Kleen Systems used several technologies, including Salesforce.com, to manage customer relationships and sales. Because of high licensing costs, employees outside of the sales force lacked access to Salesforce.com. It was also difficult to integrate it with other tools or adjust it to reflect evolving business needs. Working with disconnected software tools, however, caused inefficiencies and resulted in unreliable information. The company replaced Salesforce.com with Microsoft Dynamics CRM and integrated it with other systems in a very fast implementation. Giving many more employees access to the solution, Safety-Kleen Systems still saves more than US\$500,000 per year in licensing. With a single, unified tool to work with customers, sales activities are vastly more efficient. Decision makers have a single, reliable source of current information to direct the company.

Situation

With the goal to “make green work,” [Safety-Kleen Systems](#) serves customers in more than 270,000 locations throughout the United States, Canada, and Puerto Rico. The company’s 4,500 employees work within a large network of branch offices, oil collection and processing centers, recycling locations, oil refineries, recycling facilities, and manufacturing operations. These offices run the largest re-refining capacity of used motor oil in North America and transform 400 million gallons of waste into 300 million gallons of usable materials per year. They also manufacture cleaning and oil products and provide services relevant to waste management, emergency response, compliance, and equipment. In addition, Safety-Kleen Systems teams develop innovative equipment for specialized cleaning needs in many different industries.

Technology Restrictions and Cost Concerns

For Safety-Kleen Systems, the ability to serve customers effectively and with optimal responsiveness is paramount. The company employs a large organization of field sales and service professionals, including a national account team. To support the field, Safety-Kleen Systems used Salesforce.com as the technology tool for managing customer relationships and communications. However, the software presented certain limitations and challenges. As Carla Rolinc, VP of IT at Safety-Kleen Systems, explains, “Because of cost concerns, we had to limit the amount of licenses we acquired, which meant not all of the people who would benefit from a customer relationship management system had access to it. We also found it difficult to adjust Salesforce.com for our business requirements or integrate it with our other systems. For that reason, sales team members had to navigate five different

systems to do their work and spent as much as 40 percent of their time on administrative duties. This was a drain on their effectiveness, especially if you consider they are all mobile, connecting with company resources from remote locations.”

Cost issues also were an important consideration for the company’s IT resources. “We found that IT professionals who can program for Salesforce.com command a much higher hourly rate than those with Microsoft .NET skills,” says Rolinc. “We already had Microsoft technology skills on our team but incurred significant expense whenever we needed somebody to work on Salesforce.com.”

Process Inefficiencies and Lacking Integrations

In addition to Salesforce.com, the field accessed discrete software tools to create and record customer quotes, manage orders, facilitate waste services, pass on customer needs and opportunities to the right person if the first responder was unable to address them, and ensure that national accounts received the right level of responsiveness. Many salespeople used [Microsoft Outlook](#) to track appointments and communicate with customers through email.

The company also owned a stand-alone mapping application to help route sales leads to the right person. Cathy King, Director of IT Applications at Safety-Kleen Systems, says, “In trying to overcome the restrictions we experienced with Salesforce.com, we created and acquired additional software tools and came up with workarounds to meet specific business needs. However, inefficiencies were common, information was not always consistent or reliable, and accountability could be obscure. For example, it was

possible to close out a customer request and resolve customer issues in the software tools without taking the actual, appropriate actions.”

Seeking Change

Salesforce.com and SAP, the company’s system of record, exchanged updates in a daily batch process. People who used either one of these systems lacked access to the other and could not be certain that information they reviewed was not outdated. Company managers and the field called for more meaningful information; consolidated, reliable reporting; and more efficient ways to work. When Safety-Kleen Systems approached the end of its three-year contract with Salesforce.com, Rolinc and company leadership decided to find another customer relationship management solution instead of renewing for another three-year term.

Solution

Building on skills and technologies already present within the company, Safety-Kleen Systems decided to implement [Microsoft Dynamics CRM](#) to replace Salesforce.com. The implementation along with training, integrations, and data migration took fewer than 90 days, meeting the deadline imposed by the end of the Salesforce.com contract. Safety-Kleen Systems engaged with Microsoft partner [PowerObjects](#), a team of highly experienced customer relationship management specialists, to complete the project successfully.

With more advantageous licensing costs, Safety-Kleen Systems was able to make Microsoft Dynamics CRM available to 1,500 employees. They include close to 600 field salespeople, 300 branch administrators, 150 branch managers, and a combination of sales executives, sales support specialists, and customer service managers. Two hundred employees from multiple locations

spent two days at headquarters to become proficient in using Microsoft Dynamics CRM and then familiarized all other users with the solution.

As part of the implementation project, PowerObjects produced several integrations for Safety-Kleen Systems:

- Of great practical importance for the field, Microsoft Dynamics CRM integrates with Microsoft Outlook and offers a consistent, familiar user interface. Sales team members and others can manage all their customer relationships, interactions, and activities within Outlook.
- Microsoft Dynamics CRM and the SAP system update each other every three hours, providing almost real-time information. “We did not want to strain our servers, so we kept intervals in the Microsoft Dynamics CRM and SAP updates,” says King. “In the future, we may greatly reduce the time spans, however.”
- Synchronization occurs every 10 minutes between Microsoft Dynamics CRM and a UNIX system, developed in-house, to manage accounts and orders for distributors in the used-oil business.
- Safety-Kleen Systems’s sales-quoting system integrates with Microsoft Dynamics CRM, so proposals, customer responses, closed deals, and business outstanding are accessible in a unified resource. In the near future, Safety-Kleen Systems is going to eliminate the quoting software and replace it entirely with capabilities within Microsoft Dynamics CRM. Already, duplicate data entry in Outlook and the quote tool has gone down by 80 percent.
- A new distributor portal enables Safety-Kleen Systems distributors to enter and review orders and check available inventory. The portal integrates both with Microsoft Dynamics CRM and the

UNIX-based account and order management tool for consistent, systemwide updates on customers and their transactions. PowerObjects technologists built this portal in standard [Microsoft ASP.NET](#), a programming language the developers at Safety-Kleen Systems are familiar with so that they can easily make modifications.

- [Microsoft SQL Server Reporting Services](#) integrates with Microsoft Dynamics CRM to support reporting, data analysis, and business planning.
- [Microsoft SharePoint Server](#) integrates with Microsoft Dynamics CRM to give access to research materials that the field may need. In the future, Safety-Kleen Systems will take greater advantage of this integration.
- Through integration with [Active Directory](#), solution users are synchronized to Microsoft Dynamics CRM automatically, including their contact and organizational information.

As part of the implementation process, PowerObjects replaced Safety-Kleen Systems's hand-off tool with functionality in Microsoft Dynamics CRM. The solution now not only routes customer issues to the best person to follow up on them but also provides full account histories and helps track all account events. The partner's team also eliminated the third-party mapping software and instead developed sales lead-mapping capabilities directly within Microsoft Dynamics CRM, together with automatic, fast routing of sales opportunities to the right representative.

Safety-Kleen Systems is planning to simplify its customer relationship management technology more and more, consolidating on Microsoft Dynamics CRM. "We accomplished much more than we expected in the very short time we had to pull this project off," says Rolinc. "Our to-do

list for the next phase of the Microsoft Dynamics CRM project has shrunk substantially, because we delivered more capabilities to the organization than we had planned. We could never have done so without PowerObjects and its unwavering commitment to our success."

Employees quickly adopted the new technology. As King comments, "Adoption of Microsoft Dynamics CRM is much higher and happened much faster than I anticipated. People who were skeptical of new technology tools because of their past experience wholeheartedly embraced Microsoft Dynamics CRM and made sure to tell us, 'This looks great! You more than delivered what you promised!'"

Benefits

Following its extremely rapid, successful implementation of Microsoft Dynamics CRM, Safety-Kleen Systems has generated large financial savings and found more effective ways to work with customers, manage sales operations, and drive confident decision making. Rolinc states, "With Microsoft Dynamics CRM, I am much more confident in the ability of IT to meet vital business needs. Our increased flexibility and responsiveness guarantee that I can deliver the necessary functionality quickly. We have the expertise in-house and integrations will be straightforward." Danny Graham, Director of Branch Operations at Safety-Kleen Systems, who often finds himself tasked with ensuring that the solution follows initiatives from company executives, says, "We are awed as we realize what we can accomplish with Microsoft Dynamics CRM and what opportunities the solution offers. It has already surpassed the expectations of the leadership team for the effectiveness of an integrated customer relationship management system."

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Save More Than \$500,000 Annually

By moving to Microsoft Dynamics CRM, Safety-Kleen Systems generated substantial financial savings even though the solution is available to many more employees. “By a conservative estimate, we save at least \$500,000 per year in licensing costs, although we acquired many more Microsoft Dynamics CRM licenses than we ever had for Salesforce.com,” says Rolinc. In addition, the company is saving close to US\$12,000 per year in no-longer-necessary licensing and maintenance fees for the mapping analytics tool that was previously in use, and avoided a one-time expenditure of \$25,000 to have a programmer rewrite the tool to work with Microsoft Dynamics CRM. In the near future, when Safety-Kleen Systems eliminates a specialized software resource that the national account team uses and replaces it entirely with functionality in Microsoft Dynamics CRM, it will create additional savings.

Safety-Kleen Systems can use its own IT professionals to manage Microsoft Dynamics CRM and adjust it for the company’s business requirements. “Using our internal resources and their Microsoft .NET programming skills costs us half of what we would have to spend to contract with a programmer who can work with Salesforce.com,” says Rolinc. “That’s not even considering that working in the Microsoft programming environment is very efficient and tasks don’t take as long to complete because of the simplified technology stack.”

Develop More Valuable Customer Engagements

With Microsoft Dynamics CRM and integrated, updated supporting technologies, Safety-Kleen Systems employees can rely on a single resource to understand and connect with customers. Says King, “All the people who need insight

into our customers now have access to Microsoft Dynamics CRM with account histories and communications. With a full view, it has become much easier to gain an understanding of customers.”

When a new lead comes in, the solution automatically assigns it to the right representative by applying geographical and other criteria. “Customers can receive a prompt response today, without waiting an hour for systems and processes to identify the right person to work with them,” says Rolinc. “When you’re a customer waiting to talk to somebody, not having to wait an hour can make a huge difference. Our accuracy in following up on sales leads and service needs has also increased by at least 30 percent, which means customers receive both a very prompt and a more helpful response than in the past.”

In communications and engagements with customers, representatives rely on a unified, comfortable software environment for all tasks. Lisa Miller, Territory Account Manager at Safety-Kleen Systems, says, “What I enjoy the most is the integration between Microsoft Dynamics CRM and Microsoft Outlook. I can use Outlook to set and review appointments and send emails to customers, and draw on Microsoft Dynamics CRM to review account histories and past exchanges with customers, all from within a single tool. Many of my customers, who also use Outlook, are quick to respond to meeting invites and reminders, and I feel I have much better assurance that they will be there for our meeting.”

Manage an Efficient, Productive Sales Operation

Across Safety-Kleen Systems’s sales organization, the company has taken advantage of Microsoft Dynamics CRM to introduce efficiencies for representatives

and managers. For starters, accessing a single software tool instead of five of them is much easier for mobile users in the field. "Today, salespeople are free to sell," says Rolinc. "By navigating a streamlined, integrated customer relationship management system, they can reduce the time they spend on administrative duties. On average, these tasks now demand between 10 to 15 percent of a salesperson's time—less than half of what it used to be. In producing customer quotes, sales representatives, on average, spend 20 percent less time than they used to."

For sales executives, the ability to review their sales teams' appointments and customer records in Microsoft Dynamics CRM and Outlook is of great value in managing the sales operation. The workflows in Microsoft Dynamics CRM help all solution users to consistently take the right steps in serving customers and record the progress of customer engagements accurately. As King comments, "Sales managers now can review the pipeline of leads and prospects for a single representative or an entire group and know what goes on in the field. They can review how representatives resolved customer concerns, reassign resources, or take action when they see an opening for mentoring or training."

Facilitate Business Insight and Smart Decision Making

Integration of Microsoft Dynamics CRM with other critical software tools, including the company's ERP system, delivers more than efficiency. It also fosters a decision-making and planning environment that can draw on current, reliable information. Says Rolinc, "Microsoft Dynamics CRM will be more and more pivotal in providing strategic data to the company. With data feeds in all directions and close-to-real-time, automatic updates, we can finally

facilitate the comprehensive, consolidated reporting that leadership has demanded for a long time. It's also great that we can do this efficiently now, with a turnaround on reporting and other integrations that is at least 30 percent faster than it used to be." Graham, who works with the customer relationship management team to translate executives' needs into technology capabilities, is at the forefront of these efforts. "Microsoft Dynamics CRM is a great insight tool and very easy to use," he says. "Having overcome the frustrations and restrictions of our previous technology, it's very gratifying to build any view that somebody might require and help decision makers rely on trustworthy, complete information based on real events. As regards the enablement of our people in sales, sales management, branch management, and executive roles, we have entered a whole new world." For Graham, that enablement often means he now can be more effective in supporting the field managers. "I use Microsoft Dynamics CRM throughout my day," he explains. "When I receive a call from one of our field managers, asking about customer or sales territory issues, the solution provides me with immediate access to all of the information I need to help resolve the issue. Prior to having Microsoft Dynamics CRM, I would have to access multiple applications to accomplish this."

Additional Resources

- [Review videos and case studies of Microsoft Dynamics CRM customers.](#)
- [Find out about Microsoft Dynamics CRM Online.](#)
- [Join and listen to conversations in the Microsoft Dynamics CRM community.](#)

For More Information

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For more information about Safety-Kleen Systems products and services, call (800) 669-5740 or visit the website at:

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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 that 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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