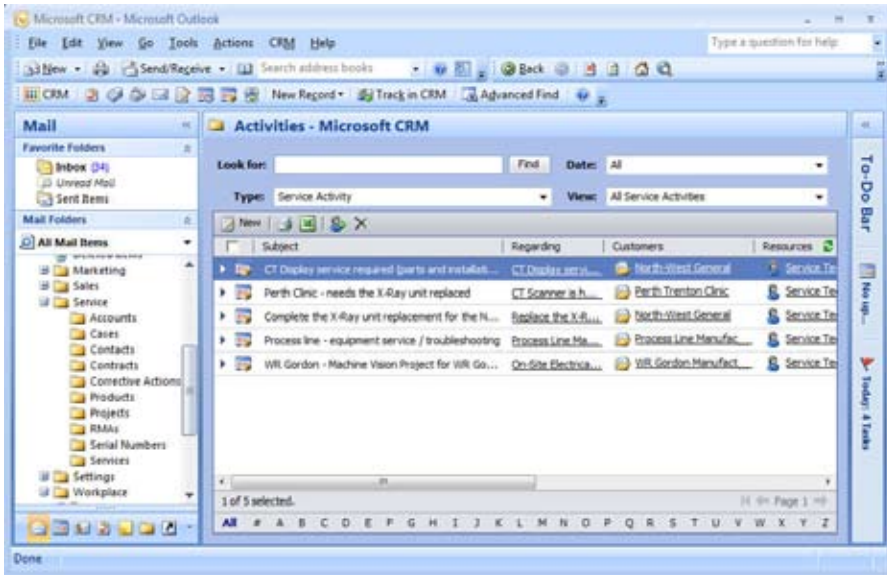


## Manufacturing Vertical White Paper



## Microsoft Dynamics CRM: Creating the people-ready Manufacturer

Microsoft Dynamics Customer Relationship Management (CRM) solution is specifically tailored to the unique needs of manufacturers. Microsoft Dynamic CRM Provides improved customer responsiveness, reduced non value-added work, and seamless integration with Microsoft Outlook.



- Improve sales effectiveness, production capacity, and demand planning through managed sales forecasts.**  
Microsoft Dynamics CRM improves plant floor visibility of sales forecasts and sales opportunities, enhancing a manufacturers' operational effectiveness with respect to the future demand for both labor and materials/parts. Sudden spikes or drops in sales require that operations make adjustments to the labor force, and can cause shortages or surpluses in inventory. Microsoft Dynamics CRM can provide advance knowledge of new sales opportunities and allow for improved cash management and production planning.
- Improve customer experience and satisfaction**  
Customer service representatives are able to promptly field customer requests and issues as they occur, and make informed decisions using centralized customer information. Customers will often make use of multiple contacts within a manufacturing organization, which can result in duplicated efforts and multiple (often different) responses, and lead to confused and dissatisfied customers. Microsoft Dynamics CRM provides improved collaboration between departments and visibility to customer information.
- Implement business processes that are auditable and that eliminate wasted effort and bottlenecks in the office.**  
Manufacturers work continuously on process improvements and lean manufacturing on the plant floor, focusing on establishing consistent, repeatable production of their products. Microsoft Dynamics CRM can assist with automating office processes and ensure adherence to standards using workflow. The end result is that issues, decisions, approvals and activity tracking can be managed proactively.
- Enhanced white-collar process effectiveness with collaboration and transparency of information across all departments.**  
Manufacturers rely on a number of line of business systems which are often maintained by, and previously visible to, specific departments or roles. Microsoft Dynamics CRM can help to improve company-wide collaboration and data sharing of customer and internal information using CRM as a common interface and activity management environment. This allows the organization to adapt to change and keep up with increasing customer demands.

## Role Based Scenario #1:

Report on and review opportunities to be included in the supply and demand planning process.

The screenshot shows an Excel PivotTable with the following data:

Sum of Total Amount	Status Reason			Grand Total
Potential Customer	In Progress	Lost	Won	
Norwall Equipment Inc.	\$ 30,000	\$ 30,000		\$ 60,000
Process Line Manufacturers Limited	\$ 101,250		\$ 165,000	\$ 266,250
<b>Grand Total</b>	<b>\$ 131,250</b>	<b>\$ 30,000</b>	<b>\$ 165,000</b>	<b>\$ 326,250</b>

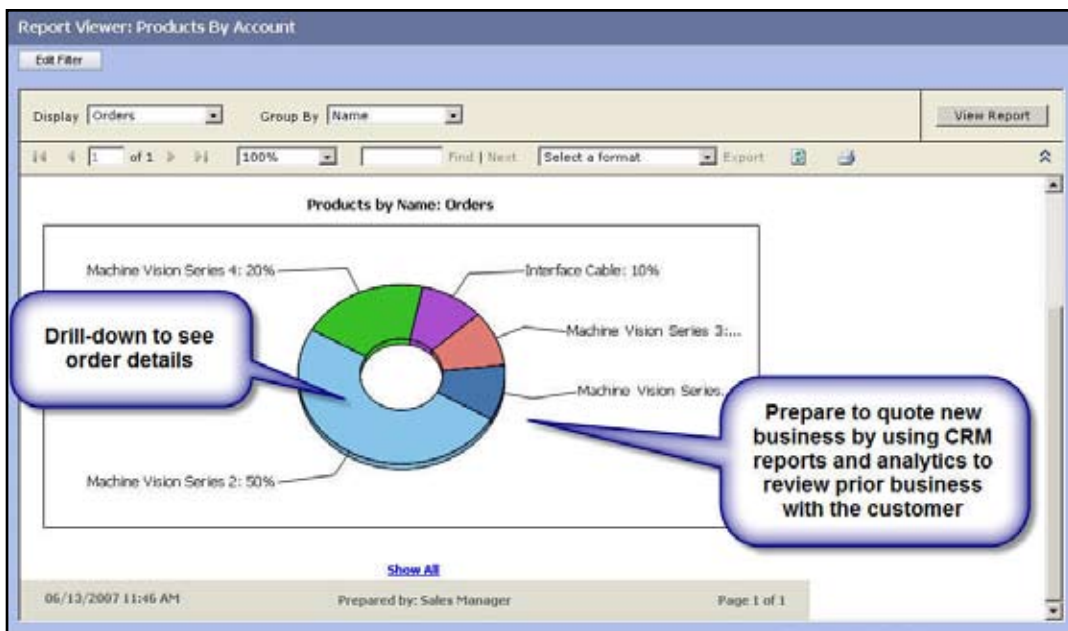
The PivotTable Field List on the right shows the following configuration:

- Report Filter: Owner
- Column Labels: Status Reason
- Row Labels: Potential Customer
- Values: Sum of Total

Use Case	Role	CRM Value Proposition
Report on open opportunities by estimated closing month	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	<ul style="list-style-type: none"> <li>A single CRM database provides a universal view of opportunities across all departments.</li> <li>The sales process stage and probabilities of opportunities provides additional information for supply and demand planning.</li> </ul>
Review open opportunities that may impact supply and demand planning	<ul style="list-style-type: none"> <li>Planner</li> </ul>	<ul style="list-style-type: none"> <li>Opportunities are filtered, reported on and analyzed based on criteria defined for supply and demand planning.</li> <li>Proactive notification of major (large) opportunities is provided through the use of triggers, automated activities or emails based on defined business rules.</li> </ul>
Report on open opportunities by estimated closing month	<ul style="list-style-type: none"> <li>Planner</li> </ul>	<ul style="list-style-type: none"> <li>Visibility of future, potential demand from CRM opportunities provides the information necessary to plan requirements and model future capacity requirements.</li> <li>Easy integration with other analytic/reporting tools (e.g. Excel) that enable dynamic, flexible reporting capabilities for the end user.</li> <li>Automated report delivery through CRM's reporting framework using SQL Reporting Services.</li> </ul>

## Role Based Scenario #2:

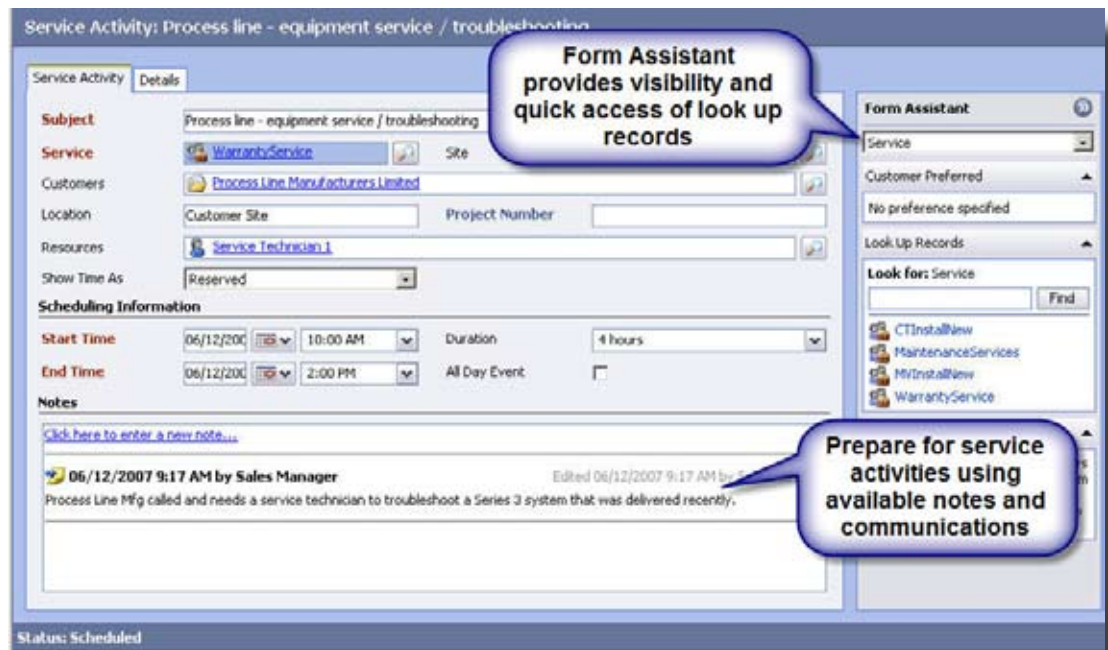
Create and track quotes, using standard or non-standard pricing along with quote closing and related activities.



Use Case	Role	CRM Value Proposition
Quote creation and activity planning	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	<ul style="list-style-type: none"> <li>Preparation for customer interactions through a shared history of activities and communications with customers.</li> <li>CRM analytics and reports through SQL Reporting Services provides graphical, drill down, active reporting.</li> <li>Standard product pricing and discount structures provide definable product and customer specific scenarios.</li> <li>Pricing and discount overrides provide flexibility in the quoting process.</li> <li>Follow-up activities are automated through the new of CRM workflows.</li> </ul>
Quote closing	<ul style="list-style-type: none"> <li>Sales Rep</li> </ul>	<ul style="list-style-type: none"> <li>Visibility of open quotes and quoting activity provides for quoting metrics and analysis.</li> <li>Automated conversion of quotes to orders, without re-keying of information.</li> <li>Quote revision tracking for visibility of quoting activities and details.</li> <li>Final disposition of quotes provides details for reporting and analytics.</li> </ul>
Reporting on quotation results	<ul style="list-style-type: none"> <li>Sales Rep</li> <li>Sales Manager</li> </ul>	<ul style="list-style-type: none"> <li>Easy integration with other analysis/reporting tools (e.g. Excel) that enable dynamic, flexible reporting capabilities for the end user.</li> <li>Use quote database, win/loss statistics and related activities to monitor quoting volumes, and activity as well as sales effectiveness.</li> </ul>
Quotation analysis	<ul style="list-style-type: none"> <li>Product Manager</li> </ul>	<ul style="list-style-type: none"> <li>Analytics are provided through CRM's reporting framework using SQL Reporting Services.</li> <li>Permanent data modules are established for on-going analysis through SQL Server's business intelligence capabilities.</li> </ul>

### Role Based Scenario #3:

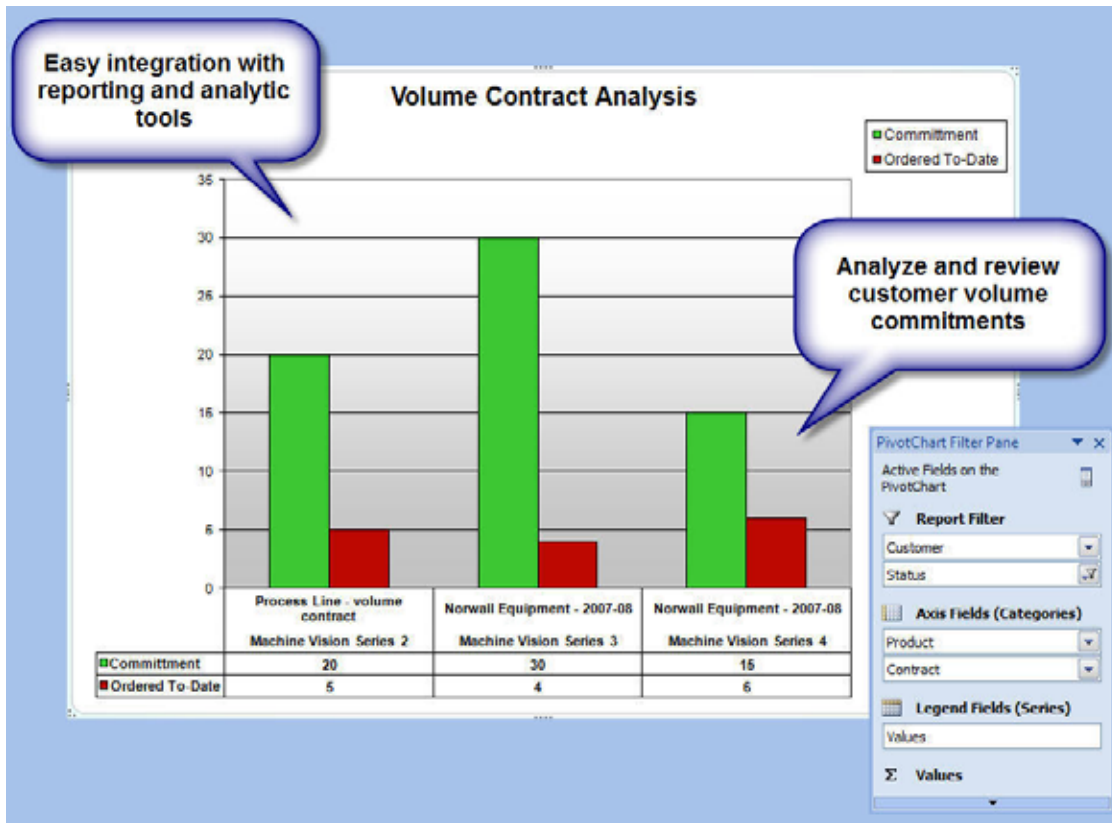
Manage open service activities for schedule changes, reviewing resource availability and rescheduling the service if required.



Use Case	Role	CRM Value Proposition
Review customer account open activities	<ul style="list-style-type: none"> <li>Customer Service</li> </ul>	<ul style="list-style-type: none"> <li>Ease of access to service activities, seamlessly integrated with Outlook.</li> <li>CRM activity history provides visibility into recent activity with the account that may be pertinent to the current service request.                             <ul style="list-style-type: none"> <li>Additional attention to other needs or requests can be addressed in the same call.</li> </ul> </li> </ul>
Review resource availability and adjust the schedule	<ul style="list-style-type: none"> <li>Customer Service</li> <li>Service Technicians</li> </ul>	<ul style="list-style-type: none"> <li>A common service activity schedule provides a universal view of all resource service activities, including warranty services, repair services, new installation services, project related services, etc.</li> <li>Resource availability is managed and tracked through service activities to automate the services scheduling process.</li> <li>Improves service schedule reliability by automatically identifying scheduling conflicts within the activity or the services</li> </ul>

## Scenario #4:

Create and review customer volume contracts and compare to orders booked year to date for the customer.



Use Case	Role	CRM Value Proposition
Volume contract management	<ul style="list-style-type: none"> <li>Sales Rep</li> <li>Sales Manager</li> </ul>	<ul style="list-style-type: none"> <li>Contracts can be used to track sales volume commitments with customers, with all contract related activity, communications and documentation.</li> <li>Contractual commitments, from the CRM database are an additional source of information for forecasts used by the supply and demand planners. Provides a consistent / common view for both sales and operations.</li> <li>SharePoint, with CRM, provides a central repository where all customer account, or other, documents can be stored.</li> </ul>
Order bookings	<ul style="list-style-type: none"> <li>Customer Service</li> <li>Sales Rep</li> </ul>	<ul style="list-style-type: none"> <li>Order bookings within CRM can be sourced through, <ul style="list-style-type: none"> <li>Conversion from customer quotes,</li> <li>Direct order entry, or</li> <li>Direct integration or imports from external systems.</li> </ul> </li> <li>All order activity history is available for review by sales and customer service representatives.</li> </ul>
Contract versus actual analysis	<ul style="list-style-type: none"> <li>Sales Rep</li> <li>Sales Manager</li> </ul>	<ul style="list-style-type: none"> <li>Easy integration with other analysis/reporting tools (e.g. Excel) that enable dynamic, flexible reporting capabilities for the end user.</li> <li>Analytics are provided through CRM's reporting framework using SQL Reporting Services.</li> <li>Permanent data modules are established for on-going analysis through SQL Server's business intelligence capabilities.</li> </ul>

BENEFITS	FEATURES
<b>Manage Your Customer Service Organization</b>	
Manage Service Contracts – Manage Service Resources – Create Service Structure and Consistency	
Create, review and manage your services contract.	A common service activity schedule provides a universal view of all resource service activities, including warranty services, repair services, new installation services, project related services, etc.
Manage open service activities for schedule changes, resource availability and reschedule when required.	Improve service schedule reliability by automatically identifying scheduling conflicts within the activity or the services scheduling window.
Create and track new service cases, assign responsibilities.	Automate service activity assignments and use queues to share activities across the services organization. Use workflows to add additional business rules or to generate alerts and notifications.
<b>Improve Sales Performance</b>	
Manage Sales Processes and Stages - Track New Sales Opportunities and Quotes – Measure Performance	
Create and track opportunities, opportunity stage and plan activities in Outlook.	Visibility of opportunities across all departments, makes the opportunity, sales process stage and probabilities additional information for supply and demand planning.
Create and track quotes, using standard or non-standard pricing along with quote closing and related activities.	Standard product pricing, overrides and flexible discount structures provide definable product and customer specific scenarios.
Create and review customer volume contracts and compare to orders booked year to date for your customers.	Easy integration with other analysis and reporting tools such as Microsoft Excel enable dynamic, flexible reporting capabilities for the end user.
<b>Improve Supply and Demand Planning</b>	
Alert Planners of New Opportunities - Expose Projections to Planning Processes - Analyze Sales History	
Keep planners aware of opportunities that may have a significant impact on operations.	Proactive notification of major (large) opportunities is provided through the use of triggers, automated activities or emails based on defined business rules.
Report on and review opportunities to be included in the demand / supply planning process.	Visibility of future, potential demand from CRM opportunities provides the information necessary to plan requirements and model future capacity requirements
Report on and analyze sales history for year over year comparisons and forecasting.	Opportunities and sales history are filtered, reported on and analyzed based on criteria defined for supply and demand planning. Automate report delivery through CRM's reporting framework using SQL Reporting Services.

*“Our implementation of Microsoft Dynamics allows service representatives to quickly troubleshoot issues, as they now have access to recent notes, service and vehicle history and parts diagrams. In the legacy system they had to access multiple siloed systems to obtain similar information, which was time consuming”.*

Bede Braegelmann  
Polaris

*“We now have greater visibility into our sales pipelines, which results in more accurate capacity planning”.*

Stacey Wells  
Catalyst Paper

# Microsoft CRM - Creating the people-ready Manufacturer

**Works the Way  
You Do**

**Easy to Use  
Runs out of Outlook**

Quick to enter, confirm, route the customer's call and information.  
Fast access to activity and communication history related to customer accounts, contacts, orders, invoices, case and service activity.

**Works the Way  
Your Business Does**

**Can be tailored to  
exactly fit each  
business**

Easily configured to meet the needs of different business processes and operating procedures.  
Supports lean operations management and processes through the means of workflow automation.

**Works the Way  
IT Wants it To**

**Reduces time and  
effort to deploy and  
manage**

Efficient linkage with existing ERP and Manufacturing Execution Systems.  
Able to meet changing process or operational needs without programming assistance.

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**Common user  
experience with  
Office & Outlook**

**4 ways to use  
(Outlook, Web, Off-line,  
and Mobile)**

**Customize for  
each person**

**Powerful workflow  
drives consistent  
processes**

**Reporting and  
Analytics**

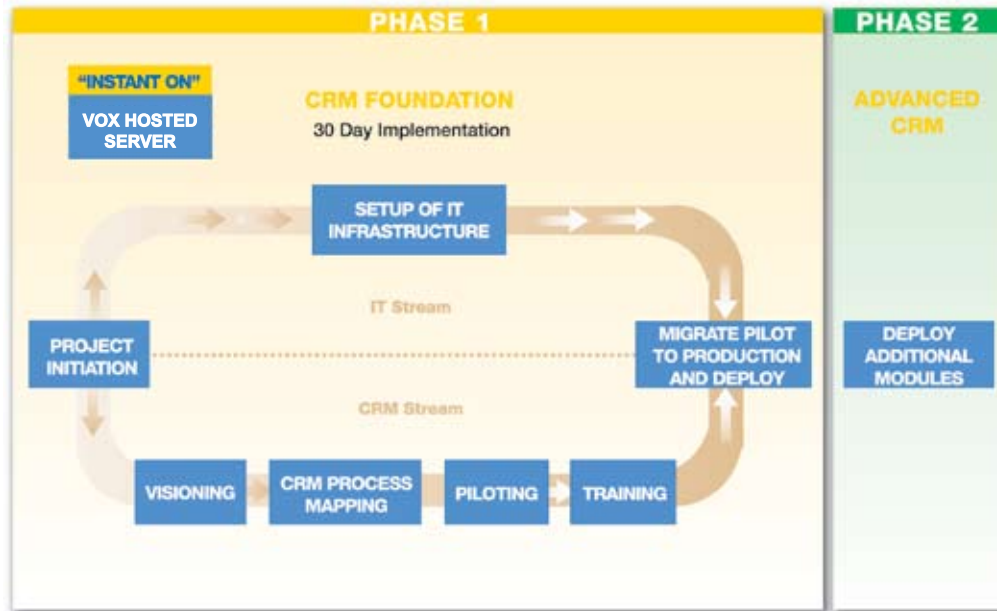
**Customize to fit the  
Company**

**Microsoft  
architecture**

**Integrate to  
external data and  
applications**

**Customize with no  
programming**

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### Microsoft Dynamics CRM Rapid Implementation Project Plan

Week 1	Week 2	Week 3	Week 4	Week 5
<ul style="list-style-type: none"> <li>• Project Kick-Off</li> <li>• Pilot Image Setup</li> <li>• Site Prerequisites Review</li> <li>• Initial Project Plan</li> <li>• Kick-off Meeting</li> <li>• Technical Environment Setup (HW and SW)</li> <li>• Legacy Data Access</li> <li>• Complete Project Plan</li> <li>• Interviews Started</li> <li>• 3rd Party SW License Purchases</li> <li>• Data Analysis</li> <li>• Project Plan Sign-off</li> <li>• War Room and Remote Connectivity</li> <li>• First Week Status Report</li> </ul>	<ul style="list-style-type: none"> <li>• Data Analysis Sign-off</li> <li>• Start Data Clean-up</li> <li>• Review Interview Results</li> <li>• UI Screen Design</li> <li>• Data Gap Analysis</li> <li>• Business Gap Analysis</li> <li>• Data Clean-up Completed</li> <li>• Business Gap Analysis</li> <li>• Sign-off</li> <li>• Screen Optimization</li> <li>• SW Licenses Received</li> <li>• Second Week Status Report</li> </ul>	<ul style="list-style-type: none"> <li>• Prod Server Install</li> <li>• Workstation Install</li> <li>• Prod Server Sign-off</li> <li>• Workstation Sign-off</li> <li>• Data Mapping Starting</li> <li>• Data Extraction</li> <li>• Screen Optimization Review</li> <li>• Screen Optimization Finalization and Sign-off</li> <li>• Migration Pilot to Prod Server</li> <li>• Technical Administration Training</li> <li>• Data Migration Script Development</li> <li>• Security Model Development</li> <li>• User Definition in CRM</li> <li>• Process User Manual Started</li> <li>• Data Load 1</li> <li>• Third Week Status Report</li> </ul>	<ul style="list-style-type: none"> <li>• Readiness Assessment</li> <li>• SOW Review</li> <li>• Data Load 1 Review</li> <li>• Training Preparation</li> <li>• Data Load 1 Validation</li> <li>• Data Load 1 Review</li> <li>• Data Load 1 Sign-off</li> <li>• Data Migration Script Revision</li> <li>• Data Cleanup Final</li> <li>• User Acceptance Testing</li> <li>• Final Revisions</li> <li>• Training Prep - Customer Setup</li> <li>• Training End Users</li> <li>• Customer Data Cut-off</li> <li>• Live Data Load</li> <li>• Final Data Extraction</li> <li>• Fourth Week Status Report</li> </ul>	<ul style="list-style-type: none"> <li>• Application Adm. Training</li> <li>• LIVE ON CRM !</li> <li>• Post Go-Live Support Starting Fifth Week</li> <li>• Status Report</li> <li>• Post-go-live Audit</li> <li>• Project Close Review Meeting</li> </ul>



## Call Today for More Information:

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