

Industrial Equipment CRM2011 Solution

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Industrial Equipment Manufacturers face many challenges in marketing, selling, and servicing customers. Microsoft CRM 2011 online is tool that can provide world capabilities to a sales force, there are improvements that can be made to the base solution that will enable them to consolidate pertinent information and use it as a communications tool to get more support to the salesmen as they need it.

Issues facing Industrial Equipment Manufacturers

Some of the Challenges Salespeople face are:

- Knowing what references are similar and can be used to help support a new sale.
- Having the right technical documents available at the right time.
- Knowing the status of ongoing projects
- Knowing the status of ongoing Service issues on existing equipment

Some of the Challenges facing management are:

- Understanding the current status of new opportunities
- Knowing when and how to deploy additional resources to new Opportunities
- Knowing the status of service issues.
- Having technical Documentation to train new hires better and faster.

Some of the Challenges facing the Technical Support Staff are:

- Giving excellent Sales support, while minimizing effort (time) spent.
- Track and communicate project status easily
- Track and communicate customer Issues easily.

With Microsoft CRM 2011 and the Industrial Equipment solution, companies can better manage all aspects of customer interaction and support.

What the Industrial Equipment Solution Adds

Equipment Reference List. This reference list is customized for each client depending on their equipment and business needs. The Equipment form is customized to meet business needs and can include hiding or showing fields depending on user input on the form. We can also do calculation automatically on the form to minimize errors in inputting data. If you have an existing "Reference list" it can be imported, greatly reducing input time. The equipment form can also have documents attached (manuals drawings, photographs, etc.), or linked to a SharePoint site

The Equipment reference list can be viewed as a total list, searched by certain values, and displayed as a list under the account where the equipment is at. When displayed under the account you can also click on a specific Equipment/ Job and open the Equipment form showing all of the details.

Project Status List. The Project Status list contains all active projects and can give all users insight into the status of a project, where there may be issues that need to be addressed, and what needs to be done to close out a project. The basic module displays forecast/ actual start finish times for different aspects, but can also be used to setup tasks, appointments, e-mails and other activities from the individual project status.

Dashboard Customization. The Dashboard is the landing page when a user enters CRM 2011. Each user can be given their own dashboard showing data relevant to their needs.

Industrial Equipment Solution Benefits

By utilizing the Industrial Equipment CRM 2011 Solution companies can provide users with a seamless windows into customer's equipment, projects, and sales and service activities. Each user can see the data that impacts their work. Users can see the activities they are assigned. Management can see the activities completed and being worked on.

From planned activities to the status of the sales and service pipelines CRM 2011 can allow users and management to monitor and proactively act on activities and issues that may impact customer satisfaction. By having a tool to collectively monitor issues follow-up is easier, and problem can be proactively resolved.

Conclusion

The Industrial Equipment CRM 2011 Solution provides additional CRM 2011 features specifically for Industrial Equipment Manufacturers. The needs for these manufacturers are somewhat unique, but by customizing the standard CRM 2011 solution, they can take advantage of a high powered standard solution combined with the customizations to make it effective for their business.