



Environment Control Systems Provider Heats Up Collaboration with Microsoft® CRM

Overview

Country: Canada

Industry: Manufacturing

Customer Profile

Vancouver-based Delta Controls provides HVAC, Access and Lighting control products and systems to customers worldwide through its network of distributors.

Business Situation

Delta Controls relies on outside partners to sell its products around the world. With no direct customer contact, the company sought ways to better manage its distribution channel.

Solution

With the help of Ideaca, Delta Controls deployed Microsoft® CRM, which helped centralize client data and encourage information sharing across the organization.

Benefits

- Centralized data
- Continuous uptime
- Familiar, intuitive interface
- Greater sales insight
- More accurate reporting

“With Microsoft CRM, we can keep better tabs on our sales leads, and manage channel and OEM [original equipment manufacturer] partnerships as well.”

Dean Mitchell, Business Integration, Delta Controls

For 20 years, Delta Controls has been a thriving business control solutions provider, delivering dependable HVAC, Access and Lighting products to commercial and government buildings, including schools, universities, hospitals and airports. The Vancouver-based company features a market leading business approach of relying on outside partners and distributors to sell its products globally. However, with no direct customer contact, Delta Controls needed to better manage the distribution channel and develop closer relationships with its clients. With the help of Microsoft® Gold Certified Partner Ideaca, the company deployed Microsoft® CRM to centralize end user data. Now everyone at Delta Control – from the Vice President to the Territory Account Managers – has enhanced visibility into account activities. Microsoft CRM helps Delta Control to improve reporting and streamline its sales process.

Situation

If Delta Controls were to pick one word that resonated most with its business, it would be “simplify.” Delta Controls has simplified the control of HVAC (Heating Ventilation and Air Conditioning) access and lighting so that anyone from building operators to hotel guests to maintenance staff can easily adjust room environments to suit their individual needs.

Unlike its competitors, Vancouver-based Delta Controls does not sell its systems directly to the public. Instead, it relies on various distributors and partners to sell its products worldwide. With no direct customer contact, tight integration with distributors is top priority for Delta Controls, which is always looking for ways to better manage its channel.

“Typically, the channel doesn’t share end-user information with product manufacturers. By using a Customer Relationship Management [CRM] tool to collaborate with partners, Delta Controls wanted to build closer relationships with end users and do more business,” says Brian Bonnor, Consulting Manager, Ideaca.

To do this, Delta Controls needed a way to track information on prospective and existing customers and catalogue this data efficiently. Although the company had invested in a Siebel-based CRM system years earlier, it never got the system to work effectively.

“Our greatest challenge was the centralization and protection of our data. Typically, customer data resided with the regional sales managers responsible for the account. Whenever an account manager left the company, client history along with prospective leads and distributor data left with them,” says Dean Mitchell, Business Integration, Delta Controls.

Without a central repository for data, information sharing was limited among the nine regional account managers (RAMs) and four technology account managers (TAMs). Because sales managers kept customer data to themselves, communication broke down among the different business groups. This took a toll on customer service.

“If a distributor had a technical problem, our technology account manager had no way to tell if a sales representative had already visited the distributor and addressed the issue,” says Mitchell.

Solution

In December 2004, Delta Controls approached Ideaca, a Microsoft® Gold Certified Partner, to find a solution that would help staff respond to its rapidly changing business needs. Ideaca deployed Microsoft® CRM. The system went live in May 2005.

“Delta Controls took ownership of the system from day one, which is really key to the success of CRM implementations,” says Bonnor.

Together with Ideaca, Delta Controls leveraged its existing Microsoft-based IT infrastructure and tailored Microsoft CRM in ways that made sense to the different users.

“We customized views according to each person’s job requirement. For example, the vice president of sales and marketing can sort account activity by RAM or TAM. Since he’s already familiar with Microsoft tools such as Outlook [messaging and collaboration client] and Office, he can pull out relevant information very quickly,” says Mitchell.

Benefits

With the help of Microsoft CRM, everyone from the vice president to the TAMs has visibility into account activities. According to Mitchell, Microsoft CRM allows him to create

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views according to user level. For example, Mitchell created a view for the VP of Sales and Marketing that shows all activities by RSM and TAM. This ensures the VP can pull relevant data quickly and easily, and helps him keep closer tabs on his accounts.

Mitchell adds that centralizing this information has also helped protect client data in the event of equipment failure. "For us, the return on investment is having a secure, central location for our data. If someone's laptop breaks down, none of our information is lost. We just re-install the client on their laptop and away we go."

Centralizing client data has also helped to streamline the sales process. In the past, leads came in through the corporate Web site and staff bid on opportunities at random. Now, the marketing coordinator can enter Web leads into Microsoft CRM, assign them to the appropriate regional account manager and track the progress of the sales pipeline.

"With Microsoft CRM, we can keep better tabs on our sales leads, and manage channel and OEM [original equipment manufacturer] partnerships as well," says Mitchell.

The system has also helped to improve collaboration within the company, especially with its U.S. channel sales managers. Delta Controls now plans to deploy Microsoft® CRM Mobile® software for its remote users. Microsoft CRM Mobile will allow remote users to easily access the information they need on sales trips.

Microsoft Dynamics

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Software and Services

- Microsoft CRM
- Outlook 2003

Partner

- Ideaca

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