



Velosio Helps Triosim Sales Teams Get Rolling with All Customer Data

The Challenge

In July of 2015, several companies in the paper and pulp industry merged to create Triosim, a diverse network of companies with broad knowledge and expertise in pulp, paper and other industries.

The creation of Triosim united several brands with a similar client base, who could better serve their clients with a combined offering from alignment to manufacturing, welding and fabrication. The new company required a process to track client relationships and a team to manage and develop these relationships.

Triosim needed to manage sales processes for six brands and 25+ Sales Engineers, and combine multiple, manually intense sales processes to become a leading edge high functioning operation.

Additional objectives included:

- Recreate sales processes leveraging the best practices from the merged organizations.
- Create a future-proof CRM platform and provide sales reps with a tool to be successful in their new roles.

Client Overview



TRIOSIMTM
CORPORATION

Triosim is a diverse network of companies with broad knowledge and expertise in pulp, paper and other industries. The Triosim network continues to grow – adding services and equipment to continue to serve their many customers. From alignment to manufacturing, welding and fabrication – their services are broad, precise and unmatched. Through their network of qualified professionals, customers have access to many additional resources, and extensive experience.



- A system that could support growth and opportunity to dominate the market with end-to-end capabilities.

The Solution

- Dynamics 365 for Sales and Service was implemented to unify client relationship management with a common sales process.
- Velosio implementation methodology included working together with the team, enabling the identification of best processes. The approach delivered an easy to use system, engaging the power users throughout the implementation process to provide gains in efficiency and productivity.

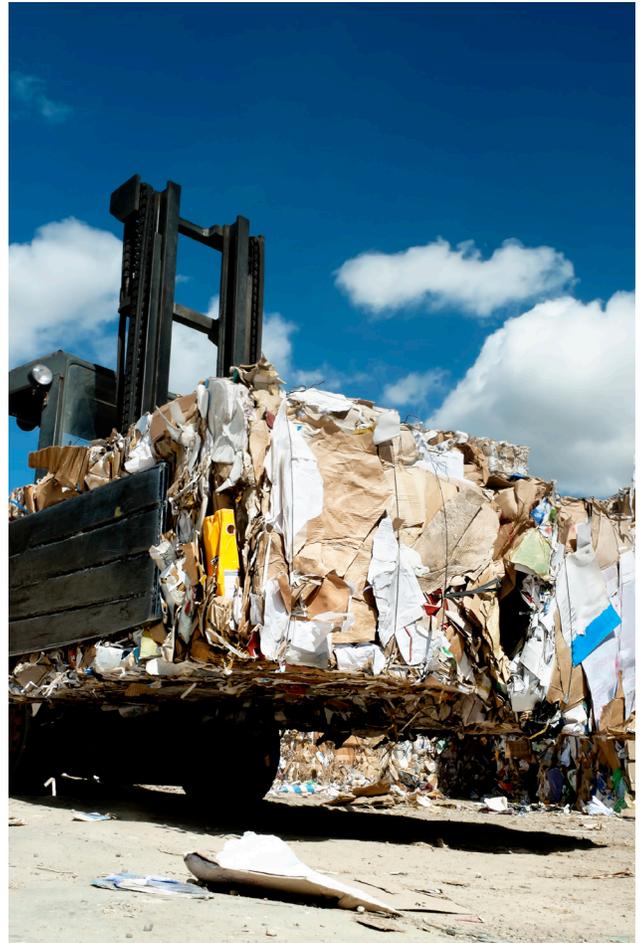
The Results

- Sales engineers gained visibility into their pipelines, which has been instrumental in the continued success of Triosim.
- Project team collaboration with quickly follow up on quotes and proposals - providing better customer service to their client base.

Client Impact

“Dynamics 365 has been a huge help to Triosim and for our sales guys especially. The guys are able to enter their information quickly and easily through the mobile app. The connected visibility we have into quotes and proposals allows for better communication between the Triosim team and our clients.”

Kurt Bramer, President of Southern Specialty



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