



CLIENT SOLUTION CASE STUDY

Columbia Machine Replaces Outdated CRM with Microsoft Dynamics Customer Engagement



Background

Founded in 1937 in Vancouver, Washington, Columbia Machine, Inc., is a worldwide leader in the design, manufacturing, and support of equipment for a variety of industries. Primary business units include Batching and



Mixing Solutions, Concrete Products Equipment Solutions, Production Equipment Molds, Mechanical Palletizing Machines and Robotic

Palletizing Solutions. Columbia Machine is one of the world's leading manufacturers of concrete products equipment, serving customers in over 100 countries. From mixing and batching to automatic cubing and splitting, Columbia builds a complete line of equipment to outfit an entire concrete products plant. www.columbiemachine.com

Field Service Management Challenges

In the past, Columbia Machine used Sugar CRM for customer and field service but ran into limitations when attempting to expand its use of the solutions.

Columbia had tried Salesforce in the past, but it was too expensive. They knew they needed to upgrade their CRM solution prior to Sugar's upcoming annual renewal in less than eight months. With Microsoft 365 and Microsoft 365 Business Central in place, they decided to transform the company into a complete Microsoft shop with Microsoft Dynamics 365 Customer Service, and a lift and shift to the cloud.

OVERVIEW

Software Solutions:

- Dynamics 365 Business Central
- Dynamics 365 Customer Engagement
- Microsoft 365 Field Service
- Microsoft 365
- Power Apps

Challenges:

- Manual Processes
- Disconnected Systems
- Reporting and Insight Constraints

Benefits:

- Managing Explosive Growth
- Capitalize on Cloud Technology
- Centralizing Global Operations
- Better Customer Experience with Field Service Automation

Company Overview:

Manufacturer of concrete products equipment. Offers material handling systems, batching, and mixing concrete machines, accessories, molds, and other products.

Industry: Manufacturing and Service
Employees: 420
Headquarters: Vancouver, Washington
Annual Revenue: \$41.4M

Goals included managing their explosive growth trajectory, managing field service for recently acquired companies with multi-language and multi-company, and field service scheduling for technicians servicing and installing huge, custom-built machines which sometimes have a 30+ year lifetime. The ultimate goal was to bring global operations under one roof. With Sugar, the team was managing customer and field service, but it was difficult to report on activities, phone calls and tasks at the customer or lead level, or efficiently track warranty information. There was not an accurate timeline or activity tracking, and reporting was inadequate for sales, marketing, field service and customer service.

“We started way back when with a homegrown CRM solution, then Salesforce, then Sugar, and we didn’t have too many challenges with any of them, but the goal was to become a full Microsoft shop with an end-to-end BC and CE Microsoft solution,” says Nikki Hagen, business analyst for CRM and ERP at Columbia. “Although it had limitations, we could have continued using Sugar, but we wanted to roll out CRM to our international subsidiaries and Microsoft Dynamics CE is a more stable solution internationally,” adds Richard Armstrong, project manager for Columbia.

Accelerated Implementation

Because of a tight timeline to beat the Sugar renewal, the Columbia team documented everything that they wished for in the new CE system so that the project would flow much smoother. Every detail was laid out for Velosio’s implementation team so that no questions were left unanswered. Velosio implemented Columbia’s wish list without custom code, instead tackling the job within Power Apps for smoother future upgrades. Phase I involved transitioning the data from Sugar to Dynamics 365 CE without a lot of changes to the current processes. The project was completed on time and within budget to beat the Sugar renewal date within seven months. Phase II involved implementing Microsoft Dynamics in Poland, India, and Brazil—enabling multi-currency and multi-language functionality. Phase III is upcoming and will involve revisiting processes to improve efficiency, policies, and procedures, and replacing all ERP and CRM systems with BC and CE.

“Working with Velosio was wonderful,” says Hagen. “Stu, Heather, and anyone else on calls here or there did a wonderful job. Their response

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Any questions we had, they had very quick answers—coming up with solutions to any of our pain points or challenges very quickly. The Velosio team continues to be great.



- Nicci Hagen
*Business Analyst for CRM and ERP,
Columbia*

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time and communication were great. Any questions we had, they had very quick answers—coming up with solutions to any of our pain points or challenges very quickly. The Velosio team continues to be great,” continues Hagen. “We are all impressed with the overall professionalism and breadth of everything Velosio was able to do,” says Armstrong. “Velosio has a wide bench with many different specialties. When problems arose, they could find someone to help us through it. The experience was excellent,” adds Armstrong.

Train the Trainer

Nikki and Richard spent a lot of time training with their implementation team so that they could disseminate the information to the end users. “After we were trained, we then held separate meetings with the sales team and services team on Teams with screen sharing,” describes Hagen. The Columbia team saved recordings from those meetings on their Teams channel so that people could refer to them. “My next step is to create short three-to-five-minute videos on topics like how to create a lead or convert a lead into a prospect or entering a support case so that when new employees come on, they can watch those short videos to learn,” continues Hagen.

Business Benefits

In Sugar, Columbia manually entered service scheduling outside the system for double entry, creating errors and omissions. This was brought into Microsoft CE, and field service was implemented for smooth scheduling. The team can now perform all functions within the system, with more functionality than ever.

“The information in Dynamics 365 CE is readily available and easy to find,” says Hagen. “Data organization, and the way the forms are laid out, as well as navigation of the product is easier. It’s intuitive how the tables are related to each other—and the functionality of building views across multiple tables at once is a huge benefit. I like how information searches are customized for the user base – this is great. And using different apps for each department to narrow the scope of what they can see is wonderful,” continues Hagen. “The mobile aspects of Dynamics 365 CE are stronger,” says Armstrong. “The reporting within field service is more powerful. Sugar had strange limitations that are not a problem with D365. It’s intuitive. And it’s Microsoft so it’s more accepted by the users,” continues Armstrong.



Columbia Machine can now:

- Create work orders to define the service work needed primarily (but not exclusively) at customer locations.
- Utilize scheduling and dispatch tools to manage resources and equipment needed for customer service, visualize onsite appointments, and optimize service schedules with efficient routing and resource skill matching.
- Utilize communication tools to enhance collaboration between customer service agents, dispatchers, field technicians, customers, and other stakeholders.
- Take advantage of an easy-to-use mobile application that guides technicians through schedule changes and service work.
- Employ asset management capabilities to keep track of customer equipment and service history.
- Execute preventive maintenance by automatically generating recurring maintenance appointments for equipment.
- Utilize inventory, purchasing, and returns capabilities to manage truck stock, purchase order requests and fulfillment, and product returns.

- Improve billing capabilities to generate invoices based on products and services delivered to customers.
- Track how resources are spending their time, whether they're traveling, on break, or working.
- Make use of analytics for reporting on key performance indicators for managing work orders, scheduling activities, and interacting with customers.
- Better track leads, prospects and sales.

"I can't say enough about the professionalism and knowledge of Stu, Heather, and the rest of the Velosio team," says Hagen. "They worked tirelessly to hit our target for go-live. Their knowledge was incredible. I would definitely work with them again," adds Hagen. "The professionalism, knowledge, and sense of urgency from the Velosio team was brilliant," says Armstrong. "Even if it was a Friday night or weekend they were jumping on any problem. It's deeply appreciated and noted by our team," concludes Armstrong.

 Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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