



Microsoft Customer Solution Customer Solution Case Study



Overview

Country: United States

Industry: Manufacturing

Customer Profile

Warn Industries designs, manufactures, and markets a full line of off-road equipment and accessories that enhance the performance of four-wheel-drive vehicles and ATVs.

Business Situation

Warn Industries sought a reliable, easy-to-use CRM solution that could provide a centralized location for customer information, increased sales efficiency, and streamlined communications.

Solution

Warn implemented Microsoft® Business Solutions CRM, an easy-to-use, customizable, and scalable front office solution that integrates with Warn's J.D. Edwards back office solution.

Benefits

- Easy access to information
- Increased sales efficiency
- Enhanced customer service
- Streamlined communications

CRM Provides Warn Industries With Centralized Location for Customer Data

“With Microsoft CRM, our sales and customer service people finally have the ability to work together in one system—and are able to track virtually any kind of customer activity.”

Travis Pierce, IT Operations Manager, Warn Industries, Inc.

For Warn Industries, a Clackamas, Oregon-based manufacturer of off-road products, toughness is a way of life. But when the company's previous customer relationship management solution couldn't stand up to the demands of this growing company, Warn implemented a new CRM solution: Microsoft® Business Solutions CRM.

Working with its Microsoft Business Solutions partner, Equarius, Inc., based in Bellevue, Washington, Warn implemented the latest version of Microsoft CRM, Release 1.2. The solution is integrated with Warn's J.D. Edwards back office software, which results in a seamless flow of information to company decision makers, sales representatives, and customer service professionals.

By having a centralized source of customer information, Warn benefits from increased efficiency, streamlined communications, and enhanced customer service efforts.

Situation

Founded by Arthur Warn in 1948, Warn Industries got its start producing locking hubs for surplus World War II Jeeps, converting thousands into useful, on-road vehicles. And the rugged WARN winch, developed in 1959, was the first recreational winch and quickly became the leading brand for off-road racers, avid four wheelers, weekend adventurers, and hard-working ranchers.

Today, Warn Industries manufactures more than 600 products and accessories for off-road, industrial, commercial and original equipment manufacturer customer use. From winches and mounting systems to hubs and powertrain components, Warn products are renowned for their durability, reliability, and dependability.

Based in Clackamas, Oregon, with manufacturing facilities around Portland, Oregon, and Livonia, Michigan, Warn has nearly 700 employees. The company sells original equipment to the Big Three auto makers as well as aftermarket equipment for trucks, SUVs, and ATVs. With more and more of these vehicles on the road, Warn's business has been booming, and the company expects continued annual growth of 10 to 15 percent through at least 2006.

Despite all its business success, Warn was experiencing difficulties and adoption issues with the previous customer relationship management solution the company had implemented. "We really had a hodgepodge of systems," explains Travis Pierce, Warn's IT Operations Manager. On the sales side, some of the company's sales representatives used the company's previous Maximizer CRM solution, while others used Microsoft Outlook and Excel as their preferred contact management system. And, Pierce notes, "I think a person or two were even using solutions they'd bought on their own."

In addition, some customer records were maintained by the customer service department in a SQL database and were accessible through Microsoft Access, while other customer and financial records were maintained in the company's J.D. Edwards back office solution.

Because Warn's databases weren't synchronized, they wouldn't talk to each other—which often led to accuracy issues among customer records. What's more, keeping all the data consistent and up-to-date was a difficult task. For instance, if a company sales representative wanted to change a piece of customer information, he or she could do it in one database, but would have to call the customer service department to have it changed in others. Moreover, because some sales representatives maintained their own databases, customer information was always at risk of not being current or accessible if the sales rep was out of town or on vacation.

Solution

Warn set a number of criteria for its new CRM solution. Most important, of course, the solution had to be able to act as a centralized, easily accessible repository for all the company's sales- and customer-related information. In addition, it had to integrate tightly with the company's J.D. Edwards back office solution, which the company had been using successfully for the last two years. Finally, the new CRM solution needed to be flexible and easy to use.

In choosing a new solution, Warn evaluated a wide range of CRM packages—everything from large, enterprise CRM solutions to popular, off-the-shelf software packages. "Ultimately, it came down to J.D. Edwards, which is our current ERP system; Microsoft CRM; and the newest version of Maximizer, which was the CRM solution we were using at the time," Pierce explains. After an in-depth

The Warn 9.5 Ti is one of the most popular winches among today's off-road enthusiasts. Warn Industries has been manufacturing and selling accessories for off-road, industrial, commercial, and original equipment manufacturer use since 1948.



evaluation, the company chose Microsoft CRM.

“What really drove our decision toward Microsoft CRM was ease-of-use,” Pierce says. “In my experience with a previous CRM system, it failed miserably because it was so hard to use.” Microsoft CRM’s tight integration with Microsoft Outlook was also a big selling point. “Our salespeople go into Outlook every day, and when they do, Microsoft CRM is right in front of their eyes,” Pierce says. “There’s no need to memorize another login and password—which is a huge hurdle we’ve been able to overcome.”

In addition, the fact that Warn already uses many Microsoft technologies also worked in favor of Microsoft CRM. “There’s something to be said for the strength of Microsoft as a company,” Pierce explains. “Even though Microsoft CRM is still in its early stages, we know that Microsoft is dedicating a lot of resources to it, and we have a lot of confidence that it’s just going to keep getting better and better.”

Warn’s Microsoft Business Solutions partner, Equarius, Inc., based in Bellevue, Washington, performed the implementation of Microsoft CRM Release 1.2, the newest version of Microsoft CRM. “Early on, we identified integration with J.D. Edwards as key to making sure Warn had the right information and would benefit from good user adoption,” says Brian Paulen, Senior Consultant at Equarius.

CRM solutions such as Microsoft CRM are most successful when they become part of a company’s business processes, Paulen says. Therefore, representatives from Equarius and Warn spent two weeks analyzing Warn’s sales processes, evaluating the interaction between sales, service, and marketing, and assessing the limitations of the company’s current customer data. This allowed Equarius

to customize the application to meet Warn’s customer data needs and identify a sales process for use within the application.

Despite the need to integrate two different software suites, the implementation process went smoothly and took approximately nine weeks. “The implementation was done right on schedule,” Pierce says. “In fact, it finished a little early—and the people at Equarius were great to work with. I have nothing but good things to say about them.”

During implementation, Equarius migrated all of Warn’s customer information into Microsoft CRM, including the information from the company’s J.D. Edwards back office system. “The J.D. Edwards database can be a very difficult one to master, but our technical resource was very capable of pulling the right information,” Paulen says.

Equarius performed the data migration using the Data Migration Framework, a standard tool Microsoft Business Solutions ships along with Microsoft CRM. Before using the tool, Equarius wrote a significant amount of SQL code to clean and adjust the data. As a result, all of Warn’s data migrated successfully.

Paulen credits close cooperation between the IT professionals at Warn and Equarius with making the data migration process a successful one. “I think the preparation up front between our team and the Warn team really allowed the migration to go smoothly.”

In addition, Equarius added custom fields to Microsoft CRM that integrate with J.D. Edwards and prevent duplicate entry of data across the front- and back office solutions, especially when setting up new accounts or deactivating old ones. As a result, information flows smoothly between the J.D. Edwards back office and the Microsoft CRM front office solutions. “Basically, J.D. Edwards just looks at Microsoft CRM and if anything’s

changed in the fields that it owns, it just overwrites them,” Pierce explains.

Warn purchased 47 Microsoft CRM user licenses and has approximately 30 currently in use. On any given day, 20 to 25 Warn employees are using Microsoft CRM. For example, the company’s sales representatives use it to set up customer visits and track activities, leads, and sales. The company’s customer service staff uses the solution to set up bulk mailings to customers, and, in the near future, the company’s marketing group will begin using it to conduct and track customer marketing campaigns.

Benefits

Single location for customer information—

With Microsoft CRM, Warn Industries has achieved its goal of making high-quality customer and product information accessible to everyone who needs it. “Now we have just one location for all our data,” Pierce says. Plus, that information is now updated automatically and available in real time.

Increased sales efficiency—All of Warn’s sales and customer service representatives will soon begin using Microsoft CRM to plot the most efficient method of calling on some of their far-flung accounts, which will help them manage their time and territories more efficiently. “We’ve created customer fields in Microsoft CRM that allow our salespeople to

group customers by geographic sales areas. This allows the sales manager to more efficiently manage their travel,” says Joel LeBlanc, Warn’s Director of North American Sales.

Enhanced customer service—Microsoft CRM is also helping improve the service Warn provides customers who access the “dealer locator” feature on the company’s web site (www.warn.com). This capability allows

customers to find a Warn dealer near them and determine if the product they’re seeking is in stock. Because the dealer locator is populated with information directly from Microsoft CRM, customers now enjoy access to real-time information about product availability.

Streamlined communications through integration with other Microsoft products—

“One of the benefits I really like about Microsoft CRM is the integration with Microsoft Outlook,” LeBlanc says. “Everybody opens up Outlook, and when they do, Microsoft CRM is right there with it. It’s an automatic procedure; you don’t have to go and open another program. It’s a simple thing, but one that saves us time.”

In addition, with Microsoft CRM, “our sales and customer service people finally have the ability to work together in one system—and are able to track virtually any kind of customer activity,” says Pierce.

For More Information

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For more information about Equarius, Inc., call (888) 462-6605 or visit the Web site at:

www.equarius.com.

For more information about Warn Industries, call (800) 543-9276 or visit the website at:

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