



## Case Study: CRM Strategy and Implementation

<b>Segment</b>	<p><b>Best-in-Class Manufacturer of products and services for new construction, retro-fits and tenant improvement projects</b></p> <p>Their go-to-market strategy includes direct sales and an international dealer network. A network of architects, owner/developers, mechanical/electrical professionals, and general contractors influences their projects.</p> <p>The company has embarked on a multi-year strategy to leverage customer-facing technology to drive sales.</p>
<b>Business Objectives</b>	<ol style="list-style-type: none"><li>1) Gain competitive advantage through sales process automation</li><li>2) Effectively manage an increasingly large and complex sales pipeline; win more work with existing resources</li><li>3) Better prepare sales reps for specifier and dealer visits/reviews</li><li>4) Help dealers and specifiers prioritize and manage projects</li><li>5) Improve communication with specifiers, dealers, owners and general contractors</li><li>6) More accurately forecast future revenues</li></ol>
<b>Solution</b>	<p>ISM designed and enhanced sales processes supported by CRM software to automate the entire sales life cycle from lead thru project opportunity thru order to create sales efficiency and competitive advantage.</p> <ul style="list-style-type: none"><li>• Integrated CRM with an external lead data source to enhance lead management &amp; quote/ERP systems to enhance project opportunity and order management</li><li>• Created comprehensive dealer, specifier and project profiles to capitalize on proprietary knowledge</li><li>• Built robust training and communication programs to accelerate change management and adoption of the new processes/systems</li></ul>
<b>Impact</b>	<p>Achieved significantly higher than industry average sales growth due to CRM competitive advantage and efficiency gains.</p> <p>Client was able to more accurately forecast future sales and adjust sales strategies as needed.</p> <p>Benefits to sales reps and sales managers:</p> <ol style="list-style-type: none"><li>1) Reps better prepared and more knowledgeable during dealer and specifier visits</li><li>2) Enhances ability for reps to manage and prioritize more leads and project opportunities</li><li>3) Improves ability for managers and reps to focus sales efforts and win more business</li><li>4) Increases the efficiency of internal communications and reporting</li><li>5) Provides sales managers better tools for mentoring sales reps</li></ol>