

Microsoft Dynamics CRM Online B to B Marketing

CLIENT SUCCESS STORY

Socius Fuels Success for Sales Diesel

CUSTOMER

Sales Diesel Inc.

INDUSTRY

B to B Marketing

LOCATION

Carmel, Indiana

NUMBER OF EMPLOYEES

80

SYSTEM

Microsoft Dynamics CRM Online

Sales Diesel is an innovative marketing management company that generates qualified leads for its clients. The highly-trained staff at Sales Diesel does the research, profiling, and C-level appointment setting to help its clients shorten their sales cycles and win new business. It is a company that understands the importance of effective communication, and to help it maximize its own communication, Sales Diesel turned to Socius and Microsoft Dynamics CRM Online.

Due for a Tune Up

Up until a year ago, Sales Diesel had been using ACT! by Sage to store the names and contact information of its clients. "We had been using ACT! as just a name-gathering tool," recalls Brad Seaman, vice president of operations for Sales Diesel. "We needed a way to see the interactions between our contacts, identify where we were spending our marketing dollars, and recognize what our sales cycle really looked like."

Sales Diesel performs C-level appointment



setting on behalf of its clients, scheduling meetings with interested prospects. The company uses a proprietary software system to track the details of these calls and appointments. However, there was no easy way to make these details available to the rest of the company, which caused a significant disconnect between sales and operations.

"When a client called with questions about an appointment we had scheduled, our customer service staff didn't have access to the answers because they were stored in another system," recalls Seaman. "We lacked visibility across our business operation."

CHALLENGE

Sales Diesel needed an effective solution to track its complex client relationships. The company's sales and operations teams needed a way to efficiently share client information.

SOLUTION

Socius implemented Microsoft Dynamics CRM Online, providing a single powerful database that the entire organization can access to track and share client information.

RESULTS

The ability to track the source of leads and the associated sales cycle allows Sales Diesel to fine-tune its sales and marketing efforts. Customer renewal rates have increased by 20%.

"Socius is phenomenal — they give us sound, practical, and creative advice. They deliver 100 percent of what they promise. It has changed the way we do business. Every penny we spent on Microsoft Dynamics CRM Online is worthwhile. Now it is painful to think about doing business without it."

Invest in a Hosted Solution

The company began looking for a robust CRM solution that could be used by both its sales and its operation teams. "Internal communications, such as sharing information about our clients and analyzing what industries bring us the most success, was an area where we knew Microsoft Dynamics CRM would benefit us as well," adds Seaman.

For help finding a solution, Sales Diesel turned to Socius, a premier CRM solutions provider — and one of Sales Diesel's clients. "We'd worked professionally with Socius and knew they were the CRM experts," recalls Seaman.

Socius recommended that the company look at Microsoft Dynamics CRM Online. "A hosted CRM system was appealing to us, because it would require few of our precious IT resources," Seaman says. "At first we worried that it might be slow, but Socius assured us the performance was there. They were right — it is a fast, powerful, and capable system."

Build Better Communication

Socius used the open architecture of Microsoft Dynamics CRM to its best advantage and developed an interface between it and Sales Diesel's proprietary system. Each day, details of scheduled appointments are transferred to Microsoft Dynamics CRM — into new fields Socius specifically designed to hold them. Now Sales Diesel has company-wide visibility into these vital activities.

"We have gone from a fragmented system to a cohesive solution. We have unified our sales and operations teams," Seaman explains. "We are now able to see the full interaction we have with our clients, and

use that information to better manage our business."

Increase Renewal Rates

Renewals are a vital part of the Sales Diesel revenue stream. Seaman notes that renewals are up significantly since the implementation of Microsoft Dynamics CRM. "Now when we call a client about a renewal, we have the details of the work we've done for them throughout the year. By approaching these renewal calls from an informed stance, we've improved our renewal rates by 20 percent."

Focus Your Marketing Efforts

Microsoft CRM is delivering the metrics Sales Diesel uses to focus its corporate marketing efforts. "The software gives us reports that detail our lead sources, and the ultimate resolution of those leads," explains Seaman. "We use that information to see, for example, that cold-call generated leads take x-many days to close, and Web-generated leads take y-days. We can then target our own marketing efforts on the leads that yield the best results."

Worth Every Penny

Seaman praises the talented professionals at Socius for making this project a success. "Socius is phenomenal — they give us sound, practical, and creative advice. They deliver 100 percent of what they promise," he says. "It has changed the way we do business. Every penny we spent on Microsoft Dynamics CRM Online is worthwhile. Now it is painful to think about doing business without it."



Columbus
7003 Post Road, Suite 300
Dublin, OH 43016

800.589.6614
www.socius1.com

Cincinnati
3805 Edwards Road, Suite 420
Cincinnati, OH 45209

Cleveland
6800 W. Snowville Rd., Suite 200
Brecksville, OH 44141

