



# Dynamics CRM makes a clean job of it



## THE SITUATION

While Dynamics GP had proven fit for purpose, company performance had pushed Crest successfully to the next stage of growth, where a fully scalable CRM view needed to come into play.

Entirely New Zealand owned, Crest Commercial Cleaning is a specialist commercial cleaning company providing superior cleaning services for over 2000 commercial customers. Crest's service delivery is via a franchise model of 270 franchisees that are supported by 16 Regional Managers, an administration team at Crest's head office in Dunedin, and a marketing team in Tauranga.

Crest's point of difference is through running very smart systems and processes so franchisees aren't burdened by huge overheads, compliance issues and documentation. Crest delivers the complete picture for its franchisee owners, including comprehensive support systems, centralised training for NZQA Unit standards, proposals, marketing and customer satisfaction programmes.

## THE PAIN

Annual growth is buoyant at 20% and Crest's Managing Director Grant McLauchlan explains why staying ahead of the game with the right business systems and processes is vital. "Managing 20%+ plus annual growth requires a great team of people and smart innovative systems. While Crest had successfully implemented Microsoft Dynamics GP to manage all the financial data and processes five years ago, this only gave us a one-dimensional view of our organisation. As part of a continuing improvement programme, we identified the need to implement a full CRM platform that would manage and improve all our non financial processes."

Microsoft Dynamics CRM makes a clean sweep of processes

With 16 regions servicing 2000 customers, an ad hoc regional approach to documentation and processes had grown over time. Intergen sat down with the Crest team and mapped the business processes, identifying roadblocks such as disparate silos of information and duplicated processes. The aim was to establish better control and standardisation of all of Crest's company documents, to produce smoother workflows and to improve the way their regional managers interacted with their customers.

Grant McLauchlan comments: "Right from when Intergen tackled the envisioning engagement we had a lot of confidence in how they worked out every function in our organisation and were able to identify inefficient processes. Having people with the experience and track record of understanding business systems and processes was refreshing." "They set us on a path of prioritising what we could get out of a strong CRM platform and we understand that the implementation of CRM will possibly never be at an end - as the ability to add efficiency and productivity gains is unlimited by utilising additional components of CRM.

We are really only at stage two of an initial 20-stage implementation plan and the value we are seeing is significant already."

"It's all just seamless and it's fantastic."

The initial deployment of CRM has tackled Crest's sales model, automating systems and workflows including leads, opportunities, proposals, contracts, scheduling duties, and site visit automation. All the processes are sitting in an automated workflow that integrates with Crest's financial system. The result is seamless and reliable. Grant McLauchlan comments how Crest has achieved a huge step up in professionalism.

"I love the idea of our processes being automated. It's a big win for better customer service and it's improved our profile and marketing ability. We are quick, slick and it's all about running a modern day business with the right systems. It will also mean cost savings in overheads and good time savings. The growth it will support is tremendous and we are quietly confident of hitting 30% growth."

The new CRM platform was delivered in time for Crest's annual conference, and earned a big tick from Regional Managers. It was also delivered under budget, which meant Crest could add further functionality to increase productivity within the initial budget.

## THE GAIN

A one-organisation view is well on its way. Crest is riding a wave of business growth and now has the workflow improvements to sustain it.

## ENGINE ROOM:

>> Microsoft Dynamics CRM