

CRM CONNECTS MERCHANTISERS TO MOBILE WORKFORCE

CRM DYNAMICS | USE CASE | CONSUMER PACKAGED GOODS

The client was a large Canadian manufacturer and distributor of consumer packaged goods specializing in fitness and sports nutrition.

Benefits

- Quick deployment
- Increased revenue
- Real-time data
- Team stays connected Products

Products

- Microsoft Dynamics CRM
- Touch Mobile™

THE CHALLENGE

With products on the shelves of North America's largest retailers, the client's team of merchandisers visit retail locations to set-up displays, provide sales training, collect market insight and maintain stock levels. Reps were expected to complete reports using an out-of-date legacy system. Reports were incomplete or missing vital information because reps missed details from store visits in the day. The field team needed a solution that would allow real-time reporting from a mobile device or tablet. It needed to be simple, quick and easy-to-use, so reps could submit information immediately following each store visit.

THE SOLUTION

Dynamics CRM was installed with custom field entities, forms and dashboards to support the needs of sales, marketing and management functions. Additionally, field reps were given mobile devices equipped with Touch Mobile™, a simple application connected to CRM providing access to simple forms, database and security.

THE RESULTS

Three months into the project, merchandisers were visiting accounts armed with mobile devices fully connected to CRM using Touch Mobile™. For the first time, management was connected to their field team real-time. As a result, the field merchandising team expanded quickly, almost doubling in size. Reps embraced the new technology because of its ease of use and benefited from additional route planning features. Reports were submitted immediately following each visit reducing the amount of data lost.