



Microsoft Dynamics Customer Solution Case Study



ProCurve Networking by HP Connects Sales Teams for Greater Efficiency

Overview

Country or Region: United States

Industry: Telecommunications equipment

Customer Profile

ProCurve Networking by HP delivers wired and wireless enterprise networking products, services, and solutions. The group is the number two worldwide vendor of network equipment.

Business Situation

With annual growth at nearly four times the industry average, ProCurve needed a new customer relationship management system that would increase the efficiency of its sales force, facilitate information sharing, and enable greater customization.

Solution

Working with Microsoft® Services, ProCurve implemented Microsoft Dynamics™ CRM and built a custom demand-forecasting module that greatly increases supply-chain efficiency.

Benefits

- Six-month return on investment
- Enthusiastic user adoption
- Improved customer service

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Ed Rice, Worldwide IT Director, ProCurve Networking by HP

ProCurve Networking by HP, the networking hardware division of Hewlett-Packard, is the number two Ethernet switching vendor in the world, with nearly four times the market growth rate in revenue. To accommodate this rapid expansion, ProCurve wanted to replace its Web-based sales force automation solution with a system that encourages greater user adoption and is easier to integrate with other business systems. Microsoft® Services helped ProCurve tailor Microsoft Dynamics™ CRM to its unique needs over a six-month period and rollout the solution to more than 400 employees around the globe. After just six months, ProCurve has recouped its investment through greater productivity, improved collaboration, and more accurate demand forecasting. In addition, Microsoft Dynamics CRM provides the technical flexibility to support ongoing enhancements.



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Al Harrington, Senior IT Analyst, ProCurve Networking by HP

Situation

Building on 30 years of innovation in networking hardware, the ProCurve Networking business unit from Hewlett-Packard is the number two Ethernet switching company worldwide, measured in revenue according to industry research firm Dell'Oro Group. The wired and wireless enterprise-networking products, services, and solutions of ProCurve are designed according to its Adaptive Networks strategy, in which networks adapt to users, applications, and organizational needs.

As ProCurve expanded its global business, the company needed to find ways to increase operational efficiencies. “Our business is growing rapidly; from 2000 to 2007, we grew at four times the market rate in revenue.¹ Typically, when a company grows fast, they either add more people or find ways to make things more efficient. We opted for the latter, especially in our sales operations, and that's what drove us to look for a new customer relationship management system,” says Ed Rice, Worldwide IT Director for ProCurve.

ProCurve equipped its sales teams with a Web-based customer relationship management (CRM) package. While this system provided the basic lead-tracking and reporting capabilities for individual salespeople, ProCurve was looking for even greater sales performance and more technical flexibility.

“Our main goal in looking for a new CRM system was not so much to add functionality as it was to get our salespeople to use the functionality available to them. We understand the value of customer knowledge

¹ According to Dell'Oro data, from 2000 to 2007, ProCurve grew at over four times the market rate in port share.

and sales force efficiency—these are key aspects to our competitiveness—but the problem was making CRM tools easy to use,” explains Andrew Wilkinson, Global CRM Manager for ProCurve. Salespeople often keep their customer contact information updated in Microsoft® Office Outlook®, so they were reluctant to enter that data again into the CRM system. This prevented more extensive information sharing and collaboration among the ProCurve sales teams and made it difficult for employees to confidently answer customer questions.

ProCurve also wanted to use information gathered by the sales teams, who have the first glimpse into future demand, to support management decisions and to inform manufacturing operations. ProCurve needed a system to capture these early indicators and help improve the predictability of its business performance.

In addition, the limited offline capabilities of the prior CRM system hindered the productivity of the field sales teams. Members of the ProCurve mobile sales team often work while in transit, at customer sites, or from hotel rooms. However, when connectivity was limited or unavailable, they could not access important information and functionality.

Solution

After investigating several CRM packages, ProCurve decided to implement Microsoft Dynamics™ CRM. They chose Microsoft Dynamics CRM because of its integration with Office Outlook and extensible architecture. “In the end, Microsoft Dynamics CRM was a better fit than the alternatives because of the ability to work offline and the seamless integration with Office Outlook, which our

salespeople absolutely depend on every day. In addition, Microsoft Dynamics CRM offers a technical flexibility that makes it easy to modify according to our rapidly changing business requirements,” says Rice.

Implementation and Support Services

After a few months of integration and testing, including a proof-of-concept delivered with help from Microsoft Services, ProCurve made Microsoft Dynamics CRM available to more than 400 employees in the Asia-Pacific region, Europe, and North America. The group continues to expand its deployment to additional employees, including call center employees around the globe. Through Microsoft Services Premier Support, ProCurve gained access to a technical account manager and a business advisor who specialize in Microsoft Dynamics CRM. These contacts worked together to guide ProCurve’s implementation and put the ProCurve CRM team in touch with product experts for Microsoft SQL Server®, Windows Server®, and even Windows® Internet Explorer®. “Microsoft Dynamics CRM is a tremendous platform for creating a system that reflects an organization’s unique needs, and it was extremely advantageous to have dedicated contacts within Microsoft during our implementation so that we could maximize opportunities for customization,” says Al Harrington, Senior IT Analyst for ProCurve.

ProCurve appreciated the option of having Microsoft Dynamics CRM run within its own infrastructure. “We are a fairly mature IT organization and value the ability to integrate Microsoft Dynamics CRM with our other systems, such as when synchronizing inventory data for our forecasting module in CRM,” says Harrington.

Enterprise Capabilities

Microsoft Dynamics CRM supports global operations at ProCurve with excellent performance from a central location. “In terms of performance, Microsoft Dynamics CRM is ideal for our salespeople who often

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Andrew Wilkinson, Global CRM Manager,
ProCurve Networking by HP

worry far more about their local connection. You can design a system with nodes distributed all over the planet, but in the end, people’s connection will only be as good as the conference room or hotel lobby they’re sitting in,” says Rice. “Microsoft Dynamics CRM offers robust offline and synchronization capabilities so that salespeople don’t have to worry about their connection.”

The security model included in Microsoft Dynamics CRM also makes it easier for ProCurve to facilitate information sharing without compromising security. For example, the company can prevent salespeople from accessing accounts beyond their purview while giving managers the ability to share and reassign accounts without complex administrative tools.

Interface Customization

ProCurve largely maintained the standard interface for Microsoft Dynamics CRM, which looks and feels like Office Outlook, but added fields to gather information specific to its own business processes. One of the most significant customizations ProCurve made to Microsoft Dynamics CRM is a forecasting module that is accessible directly from the main interface. Developed using in-house expertise with the Microsoft .NET Framework, the forecasting module enables salespeople to identify the months in which revenue from a sale will occur. This specificity about customer demand helps ProCurve to plan the allocation of resources with better accuracy.

ProCurve also worked with a Microsoft partner to create specialized training videos that can be viewed from within the interface. These videos serve as a how-to reference to help new users take full advantage of

ProCurve’s customizations to Microsoft Dynamics CRM.

Foundation for Collaboration

The sales teams at ProCurve continue to discover new ways to take advantage of Microsoft Dynamics CRM as they collaborate on accounts and execute sales strategies. For example, the integration of Office Outlook with Microsoft Dynamics CRM supports the sales process as salespeople set follow-up tasks for themselves and send tasks to one another. “Microsoft Dynamics CRM makes it simple for team members to share all types of information related to a particular account. This is especially important for large accounts where there are many pieces moving at once—Microsoft Dynamics CRM lets salespeople track customer communications and share tasks so that everyone is apprised of the account status,” says Wilkinson.

Reporting

Because Microsoft Dynamics CRM uses the same SQL Server database ProCurve has in place for other systems, the company can easily generate reports that incorporate customer and sales data. ProCurve uses Microsoft SQL Server Reporting Services to create these reports and has plans to use Microsoft Office PerformancePoint™ Server 2007 and ProClarity® business intelligence software to deliver even more advanced reporting to employees in the future. Those plans include making role-specific, real-time information available to people through reporting dashboards in Microsoft Office SharePoint® Server 2007.

Benefits

Microsoft Dynamics CRM gives ProCurve a solid foundation on which to continue growing its business and strengthen its leadership

role in the networking equipment market. The new solution offers ProCurve salespeople powerful tools to increase individual and team productivity, including robust offline functionality and the ability to share information from Office Outlook. Because Microsoft Dynamics CRM has become an integral part of how employees work, ProCurve now can more effectively plan and act on customer information in the system.

“Microsoft Dynamics CRM unifies the CRM system with the tools that our employees use everyday. Instead of adding steps or complicating the process, the CRM functionality—especially the forecasting module that has been so critical to this project’s success—is both convenient and unavoidable,” says Wilkinson.

Six-Month Return on Investment

After just six months, ProCurve reaped savings to offset the costs of implementing Microsoft Dynamics CRM. ProCurve attributes the success of the deployment to the eager acceptance of the new solution among employees and the increased supply-chain efficiencies due to better forecast information. With the custom forecasting module in Microsoft Dynamics CRM, ProCurve managers and operations teams have a more accurate read on upcoming demand.

“We have much better visibility into our sales pipeline with Microsoft Dynamics CRM. That information has helped us inform our supply-chain operations and allocate sufficient resources without producing excess capacity,” says Rice. “We can free up more of our working capital for other areas of the business.”

Many processes are now much simpler, saving time and increasing the speed at which information travels through the organization. For example, Microsoft Dynamics CRM automatically compiles sales pipeline reports so that sales managers do not have to spend time piecing together those reports in Microsoft Office Excel®, as in the past. Going forward, the division expects to realize even greater savings as it continues to refine its use of Microsoft Dynamics CRM.

Enthusiastic User Adoption

Microsoft Dynamics CRM borrows the look and feel of Office Outlook, so it was familiar and easy to learn for ProCurve employees. “Our salespeople find Microsoft Dynamics CRM intuitive and supportive of their day-to-day tasks. They can easily see the benefits of the system and are actually using it more than we had planned. We had expected to have to push the implementation, but instead our employees are pulling us along and requesting even more features,” says Rice.

The new solution has also instilled a sense of ownership of the tool in ProCurve employees. “With Microsoft Dynamics CRM, we’ve empowered the sales representatives. While we still have great administrative controls, Microsoft Dynamics CRM pushes decision making down to the sales teams so they feel this is their tool, not just something to support the organization,” says Wilkinson.

Improved Customer Service

Besides facilitating greater operational efficiency, Microsoft Dynamics CRM also helps improve customer service at ProCurve. For example, sales teams have a holistic view of customers because Microsoft Dynamics CRM shares contact information and customer history with Office Outlook. With the

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For more information about ProCurve Networking by HP products and services, call (800) 975-7682 or visit the Web site at: www.procurve.com

previous Web-based CRM system, salespeople had to reenter contact information they already had in Office Outlook.

“With integrated contact management, we’ve dramatically increased our ability to capture knowledge assets. Microsoft Dynamics CRM removes the barriers to recording and sharing customer information across the company,” says Wilkinson. “Information is no longer stuck on one person’s laptop. We can respond to customer questions quickly, without having to reach a particular person.”

Microsoft Dynamics CRM also offers ProCurve abundant opportunities to streamline processes so that salespeople are free to focus on customers. “I don’t want our sales representatives wasting time entering data twice or filling out unnecessary forms. Microsoft Dynamics CRM helps us streamline our processes so that our representatives spend more time getting out in front of customers, smiling, shaking hands, solving problems, and closing business,” says Wilkinson.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what’s most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM
- Microsoft Office
 - Microsoft Office Outlook
 - Microsoft Office PerformancePoint Server 2007
 - Microsoft Office SharePoint Server 2007

■ Technologies

- Microsoft SQL Server Reporting Services