

Outlook Communications

Increasing productivity with Microsoft Dynamics CRM



Client

Outlook Communications

Website

www.outlook.co.uk

Location

Northampton

Sector

Conference & Multi Media Production

Customer profile

Outlook is an independent, award winning Live Event Production Company and has been delivering highly successful communication solutions for over 20 years.

The range of services offered by their teams can be used as a single service or a complete solution using their three core specialist areas: live event, video & multimedia/design.

Outlook recognises that good communication is the key to any organisation whatever the size. Successful communication can help to directly influence performance levels and their aim is to create a solution that fits with businesses objectives and requirements adding as much value and innovation as possible along the way.

Their primary focus is always the audience; what they hear, what they see and ultimately what messages will remain with them long after the event or programme has ended.

Solution and technology

Microsoft Dynamics CRM 3.0

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“From our first meeting right through to implementation Trinity has impressed us with their accessibility and technical knowledge of the Microsoft CRM package”.

Amie Pocock, Operations Manager, Outlook Communications

Challenge

Outlook used Goldmine, a customer relationship management system, to manage its sales and marketing processes. The team also heavily used Microsoft Outlook, Excel and other office with little integration with Goldmine. This meant that information was not readily available in one location and management did not have a holistic view of sales and marketing activity.

The company was looking for a CRM system that could offer greater functionality, email integration with Microsoft Outlook and also enable offline or online working.

Solution

Outlook decided the best fit solution would be Microsoft Dynamics CRM.

Dynamics CRM provides tight integration with the Microsoft Office Systems, in particular email and activity management. It also enables online or offline working, which is beneficial to Outlook as its sales team can access the tool regardless of the location.

The different modules within Dynamics CRM supports the sales, marketing and customer service functions of the business. The sales module supports the business development function at every stage of the sales cycle, from leads and opportunities management to fulfilment and invoicing. The end to end sales management supports greater management of information in the form of forecasting and monitoring success

rates by sales person, market or geography.

The marketing module enhances the efficiency of the marketing engine with features such as list creation, quick campaigns and campaign management. It also allows marketing to measure the success of campaigns through integration with the sales module, return on marketing investment and more targeted, relevant marketing activity.

Throughout the project our CRM consultant was involved with initial discovery meetings, the implementation and going live of the system. This ensured that from the beginning of the project we had a clear understanding of Outlook's exact requirements and eliminated any miscommunications.

The project was completed within timescales and to budget and we are now providing ongoing support and ongoing development services to Outlook.

Benefits

- Increased user adoption
- Holistic view of sales and marketing processes
- Familiar and consistent user experience
- Synchronisation with Office Outlook
- System is easy to customise internally to make further improvements.

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