MCA CONNECT

AMERCAREROYAL

CASE STUDY

SITUATION

With a network of 1,000 distribution partners, AmerCareRoyal is a leading provider of branded disposable products for food service and retail clients across the country. Keeping track of quotes and sales opportunities is essential to their business.

Through a series of mergers and acquisitions, AmerCareRoyal ended up with 3 different customer relationship management (CRM) systems, plus a variety of spreadsheets to generate sales quotes and manage sales opportunities.

Without centralized systems and processes, customer communications were getting buried in email. Reps had no easy way to see when quotes were expiring and pricing changed. Because employees didn't trust the data, they were constantly checking information from multiple systems to ensure accuracy and had implemented a complex quote approval process.

" MCA Connect has been a great resource and technology partner."

— Eric Paladino, Royal Paper/AmerCareRoyal

SOLUTION

AmerCareRoyal knew they needed to streamline their sales process and move to one system. The goals of the Microsoft Dynamics 365 Customer Engagement project were to:

- Create enterprise visibility by moving to a single enterprise CRM platform
- Accelerate the sales process by providing reps with a common quoting platform
- Be able to add customer service functionality

Because the company already had Dynamics 365 for Finance and Operations, as well as Office 365 in place, Dynamics 365 for Customer Engagement was a natural choice – and turned out to be a great fit.

MCA Connect developed a comprehensive proposal to unify data, systems and people. MCA Connect also built a custom Pricelist Margin Quoting system, that pulls costs from the multiple ERP systems.

At a glance, sales reps can compare quotes and analyze profit margins. The new system makes it easy to track opportunities and follow-up with quotes before they expire. Quotes under a certain margin threshold are automatically escalated for management approval.

Once the sales management features were live, AmerCareRoyal added the customer service Case Management functionality. For the first time, customer service reps were able to track issues or questions from customers, ensure they were followed-up on, and increase satisfaction.

In addition to customer management, the Purchasing team adopted CRM to track and process all internal questions for billing and shipping. By working closely with the sales team, they can quickly share information and increase efficiency.

RESULTS

AmerCareRoyal now has enterprise visibility of customer information across sales, customer service, and purchasing– across all regions. Users and management feel like they can make faster and better decisions because the information is reliable and accessible. Simplifying the sales process has freed-up time for sales reps to pursue more sales opportunities.

FUTURE PLANS

The company is continuing to improve its technology investment by exploring ways to leverage Dynamics 365 to generate more leads and add more value to existing customers.

"Dynamics 365 has everything we need to create enterprise visibility and achieve our business vision."

— Eric Paladino, Royal Paper/AmerCareRoyal

ABOUT MCA CONNECT

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MCA Connect is a nine-time Inner Circle Microsoft Gold Certified Partner helping manufacturing, energy and service companies around the world drive business performance.