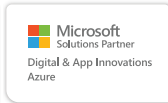


SUCCESS CASES



Microsoft Dynamics CRM

Microsoft Dynamics CRM enables Logic to improve customer relations

COUNTRY: Portugal

SECTOR: Logística

CLIENT PROFILE: Logic provides logistics services to SMEs and large companies. It has a warehouse capacity of around 50,000 square metres and 170 employees. Business situation For Logic it was important to introduce a system to respond to the increase in business and its complexity. It opted for a CRM system that would also allow it to structure processes and centralise information.

SOLUTION: Microsoft Dynamics CRM

BENEFITS

- . Improved coordination between company and customers
- . Better structuring of customer relationship processes
- . Monitoring of all commercial and marketing activity
- . Easier access to information

“Microsoft Dynamics CRM has allowed us to centralise customer information, structure processes and organise them according to the needs of each functional area.”

Tiago Silvestre, Director of Information Systems at Logic - Logística Integrada, SA

Logic has been operating in the logistics sector since 2001. Although logistics outsourcing in Portugal still has room to grow, as it still has lower penetration rates than in other countries, the truth is that competition is high, particularly from large multinationals.

Logic's recent history has seen it grow in size and, as a result, it felt the need to structure its customer relations processes in general and, in particular, the commercial side, from identifying opportunities to after-sales service. Centralising information was also an objective, in a context where there were various repositories and sources of customer data.

This led Logic to look for a CRM solution, with requirements such as flexibility to adapt to the business and ease of integration with e-mail. The evaluation led to the choice of Microsoft Dynamics CRM, implemented by Arquiconsult.

SITUATION

Logic - Logística Integrada, a company in the logistics sector that has been operating in the Portuguese market since 2001, has a wide range of solutions and services, organised into three main levels: Logic Classic, LogiCeasy and Logic in your Home. Its offer, organisation and structure enable it to address both the SME and large company markets.

Based in Póvoa de Santa Iria, it has warehouses totalling around 50,000 m². For this company, simplified logistics has been its mantra since 2006, which at the same time summarises the way it sees its business. Despite its recent history as an autonomous company, following an MBO (Management Buy-Out) process in 2005, which marked the separation from the SPC Group to which it belonged, it has several reference clients, including Aki, Loja do Gato Preto and Galp.

It has been growing in size, with around 170 employees and the prospect of expanding its warehouse capacity with the creation of a new physical space.

As a logistics operator, Logic operates not only in warehousing, understood here in a broad sense, but also in transport, where it follows a subcontracting strategy. The sector in which it operates is relatively new in Portugal, where logistics outsourcing has not yet reached the penetration rates of other European countries. However, competition is strong and comes mainly from large multinationals. That's why quality, service innovation, team competence and, of course, the ability to establish and maintain long-lasting relationships with clients are important assets that Logic is always on the lookout for.

Initially focussed on implementing operational business support systems, Logic's strategic lines included improving customer relationship management, with a focus on better structuring of processes and an increased ability to monitor interactions with customers, regardless of the points of contact.

The need to implement a Customer Relationship Management solution became obvious. **"One of the reasons we considered investing in a CRM system was the company's growth. The fact that Logic is growing in size brings with it an increase in complexity. On the other hand, in terms of marketing and sales we didn't have any structured support tools and, once again, with the expansion of the offer, the services provided, the team and the number of clients, the need for centralised information management began to become apparent. The data was scattered among various people and files, which complicated the task of getting to what was needed quickly. Thirdly, there was the process component. Although we don't have many clients, the processes are complex, and the negotiation phase requires detailed monitoring, in a context where from the detection of an opportunity to the closing of a deal, months or even years can pass, with various players and intermediate proposals,"** says Tiago Silvestre, Information Systems Director at Logic - Logística Integrada, SA. He adds:

"a CRM solution makes it possible to centralise information, structure processes and organise them according to the needs of each functional area".

With its objectives clearly identified, Logic began a process of evaluating solutions on the market. The choice fell on Microsoft Dynamics CRM, implemented by Arquiconsult.

As part of the implementation of Microsoft Dynamics CRM, we did some process re-engineering and, in some cases, readapted our way of working to what the system itself 'proposed', as we felt that there was structuring that could bring added value."

Tiago Silvestre, Director of Information Systems at Logic - Logística Integrada, SA



SOLUTION

Tiago Silvestre emphasises that the process of analysing potential solutions wasn't long, but the detail was high. Among the criteria that supported the decision was the solution's flexibility to adapt to business processes.

For Logic, it was particularly important that the software had a high level of integration with the email component, not least because email is increasingly important in carrying out day-to-day tasks and in contacting customers, both for the sales team and for employees in other functional areas.

With Microsoft Exchange as its email platform, Logic didn't want this starting point to limit its alternatives and even considered the possibility of changing its email system in order to have the CRM solution with the highest fulfilment of requirements. **"For us it was equally important to invest in a technological platform that would give us a guarantee of evolution,"** emphasises Tiago Silvestre. From his point of view, the choice of Microsoft Dynamics CRM was facilitated by the fact that it had advantages in the various criteria. **"I would say that the Microsoft solution won across the board, including ease of use, the level of integration with the email system, the quality of the implementation partner itself, Arquiconsult, and the price,"** he emphasises.

The implementation project, which followed the methodology recommended by Microsoft, focussed on two main areas, sales, and marketing, and also included the company's management among the user group. Implementation began in April 2007 and by July Microsoft Dynamics CRM was already in use.

"We set up a mixed team, with Arquiconsult and members of our team, identified the key users and held several preparatory meetings to define the scope and level of customisation of the solution. The preparatory work was very important for the smooth running of the project"

recalls Tiago Silvestre. He also emphasises the importance of the training phase, the involvement of users and the strategy of phasing data into the system as elements that contributed to the success of signing up to the new system. Since no customer relationship management software existed before the introduction of Micro soft

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Dynamics CRM, there was no formal migration process. The new system was fed by importing information entered into Excel and by data entered by the employees themselves. In the historical component, the strategy was one of progressive introduction and in terms of new customers or "new customer information" it was a given that Microsoft Dynamics CRM would have to be the base system.

"As we experience new needs, we introduce more data into CRM. We think it's a methodology that allows us to overcome users' natural resistance to new ways of working or new systems. Nowadays it's the users themselves who take the initiative to feed the CRM with new data, because they feel the new tool is useful for their work," says Tiago Silvestre. And he adds: "as part of the implementation of Microsoft Dynamics CRM, we did some process re-engineering and, in some cases, readapted our way of working to what the system itself 'proposed', as we felt there was a structure that could bring added value."

Nowadays the entire commercial process is based on the Microsoft solution, from identifying new opportunities to closing the deal and, after that, involving all the contract monitoring, namely by the after-sales team, which has a mainly coordinating role, aimed at ensuring that the level of service agreed with customers is being met.

The telemarketing side, which focuses in particular on the Logic Easy service aimed at small and medium-sized businesses, is also involved. "The CRM system makes it easier to flesh out the existing customer-orientated strategy," he emphasises.

BENEFITS

One of the benefits that, according to Tiago Silvestre, became evident with the investment in Microsoft Dynamics CRM was precisely the improvement in coordination between the company and its customers, which was reflected in customer satisfaction and, of course, in the potential for loyalty. On the other hand, the same manager highlights the introduction of a greater level of clarification in the structuring of processes, and it is certain that the monitoring of the entire commercial flow has been facilitated. By having a system centralised on the client, it is possible to know what interactions have been made with them, by whom, for what purpose or with what results.

The capacity for internal evaluation has also improved since the level of recording and access to information has increased.

Tiago Silvestre also highlights the centralisation of information. **"There was some time wasted requesting data that we knew existed, but we weren't always aware of its location. Microsoft Dynamics CRM presents itself as a centralised repository that allows various users from different functional areas to quickly obtain what they are looking for,"** he says. He adds: "A tool like CRM really facilitates the relationship with the customer. Previously, if the customer made a request to one of the operational areas and no record was kept, it was only known to the person with whom contact had been made and could be 'lost'. With CRM, in addition to the record, information is shared, and it becomes easier to supervise and control what needs to be done". There is also integration with the email platform, with an impact on the management of collaborative work.

After a few months of using the system, Logic began to look to the future, considering new ways of exploiting it. With Arquiconsult, it has begun to study the use of Microsoft Dynamics CRM to monitor and renew supplier contracts. On the other hand, there are plans to extend the range of users of the solution to operational areas and even to the information systems team, not least because in many businesses, particularly with large organisations, systems integration is involved between Logic and its clients, boosting the automation of logistics processes

"The management of complaints, recorded in the CRM, should now be dealt with by the operational area," he anticipates"



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ABOUT ARQUICONSULT

Arquiconsult is an information systems consulting company, based on Microsoft Dynamics technologies, with offices in Barcelona, Bilbao, Lisbon, Luanda, Madrid, Oporto, Riyadh, Salamanca, Seville and Vila Real.

Composed by the largest and most experienced team of consultants, having already implemented some of the most complex Microsoft Dynamics Business Solutions and being frequently referred to international clients for their implementations in our country.

Arquiconsult is constantly innovating its offer and has several verticals available, for several activity sectors, which add value to Microsoft Dynamics 365. Microsoft Dynamics AX is a clear example that allows us to make available to Portuguese and international companies the best and most complete integrated Management solution.

Some reference clients in the various sectors of activity:

- Polopique
- Dunlop Protective Footwear
- Teka Portugal
- Klaveness
- Farfetch
- Stericycle
- SAPA
- Gunnebo
- Tecnocabel

LOCATIONS

BARCELONA | BILBAO | LISBON | LUANDA | MADRID
OPORTO | RIYADH | SALAMANCA | SEVILLE | VILLA REAL

PT (+351) 218 205 610
comercial@arquiconsult.com

ES (+34) 633 907 561
comercial.spain@arquiconsult.com

AO (+244) 939 954 360
comercial@arquiconsult.com

KSA (+966) 50 763 4302
comercial@arquiconsult.com



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