



## Microsoft Business Solutions Customer Solution Case Study



### CRM Solution Helps Farm Equipment Manufacturer Increase Sales by 30 Percent

#### Overview

**Country or Region:** United States

**Industry:** Manufacturing

#### Customer Profile

OXBO International develops, manufactures, and supplies high-end agricultural equipment for niche markets. It has manufacturing facilities in New York, Wisconsin, and Washington.

#### Business Situation

The company lacked a standardized way to collect and organize customer account information. It needed to be capable of delivering real-time customer account information to its traveling sales force.

#### Solution

Technology partner ISS Group upgraded OXBO to the Microsoft® Windows Server™ 2003 operating system and Microsoft Office Professional Edition 2003, and installed Microsoft CRM for the sales staff.

#### Benefits

- Sales force increases revenue
- Real-time information helps streamline sales process
- Remote access saves time
- Solution helps forecast sales, manage customers better

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*Scott King, Central Coast Sales Representative, OXBO International*

OXBO International manufactures and sells high-end harvesting and food processing equipment, with a large part of the business involving sales of used equipment. OXBO needed a better way to collect and track customer account information such as contacts, e-mail messages, inquiries, and leads. It also needed real-time sales and inventory information so that it did not sell the same piece of equipment twice. When OXBO heard that its Microsoft® Gold Certified Partner ISS Group was supporting Microsoft CRM, OXBO requested a solution. ISS upgraded Microsoft Small Business Server 2000 to the Microsoft Windows Server™ 2003 operating system and installed Microsoft CRM for 19 users in the sales force. Since using Microsoft CRM, OXBO has increased its revenue by 30 percent due in part to its ability to provide real-time tracking of inventory, leads, and general account information.



## Situation

OXBO International Corporation develops, manufactures, and supplies harvesting equipment for specialized agribusiness segments. For more than 30 years, OXBO has focused on niche markets for high-end farming and food processing equipment such as harvesters, high-clearance sprayers, and mechanized vineyard products. Most recently, OXBO has begun supplying harvesting equipment to Florida's citrus industry.

OXBO has three manufacturing facilities located in Wisconsin, New York, and Washington. The company does not use outside distribution to sell its equipment; instead, its salespeople sell directly to the end user. Its 19 salespeople are located throughout the United States, and these individuals split their time working between their regional offices and their home offices. Although OXBO sells new farming equipment, the company focuses a large part of its business on upgrading customers' machinery, refurbishing the trade-in machinery, and reselling it.

### Competition in a Tight Market

To compete with larger farm equipment manufacturers, OXBO needs to have tight control of its inventory and knowledge of its customers' needs and current OXBO equipment. "The machinery that we build retails for between \$100,000 and \$500,000. Used equipment sells for 40 to 50 percent of the original price," says Scott King, Central Coast Sales Representative for OXBO International. "We really need to know detailed information about the condition of the equipment from the initial sale to the resale. The more information we know, the better we can represent it and understand what it will take to get it back out in the field."

To keep track of contacts, opportunities, and accounts, OXBO used Net Folders, an organizational function of the Microsoft® Outlook®

2000 messaging and collaboration client. Using Net Folders was a time-consuming process, however, because it required salespeople to drag collected data such as e-mail messages, contacts, and spreadsheets to the corresponding customer folder. Each time an individual placed a document within a shared folder, every person who had access to the folder would receive an e-mail notification. The system became a burden because the Inboxes of sales force members were being flooded with e-mail notifications that a document had been added or deleted from a folder.

### Information Organization Challenges

Another problem was organizing the information within the folders. The folders did not have a standardized method of organization; oftentimes information was placed in the wrong folder, duplicated, or accidentally deleted. The lack of a standardized system for organizing important customer information made the job of the sales force challenging.

Executives decided that OXBO needed a centralized database to connect the sales force with real-time sales and inventory information in order to prevent problems such as duplicate sales. For example, if a piece of farm equipment was sold from the company's inventory in the morning and the sales force was not made aware of the transaction, another salesperson could technically sell that piece of equipment that afternoon.

"We deal in a lot of different markets so we really needed a way to segregate the customer base, organize our customer accounts, and use our customer data more efficiently and effectively," says Andy Talbott, Vice President of Sales for OXBO International. "Also, because we deal directly with the customer and we are constantly moving high-price ticket items through inventory,

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Lisa Talbott, Sales Coordinator, OXBO International

we needed to have real-time inventory information that we could act on.”

OXBO wanted a centralized repository to collect customer information and efficiently connect the sales force with buyers and sellers of used equipment. The goal was that the sales force would have a real-time view of inventory, including information about customer accounts, leads, purchase histories, and the condition of farm equipment being traded in or sold.

### Solution

Because OXBO had no way to effectively manage its customer information, the company began exploring several customer relationship management (CRM) options, including Salesforce and GoldMine. However, none of the products were a good fit. “All the CRM packages that we looked at seemed to be written more for the finance or insurance industries,” says Lisa Talbott, Sales Coordinator and now retired from OXBO International. “We couldn’t tailor the solutions to fit our needs.”

In March 2003, when OXBO learned that its technology partner ISS Group was supporting the newly released Microsoft CRM, OXBO approached ISS about implementing a solution. Even though Microsoft CRM was a version 1.0, OXBO had no qualms about moving forward with it because it surpassed the alternatives in its customization capability. “One of the reasons why we went with Microsoft CRM was that we could customize the fields within the solution to meet our business needs, such as market segments or the acreage of a farm,” says Lisa Talbott.

ISS moved forward with a pilot program to implement Microsoft CRM. As part of the agreement, ISS would host the required server computers and Microsoft CRM at its headquarters in Little Falls, New Jersey,

because OXBO had only one person in its IT department in Byron, New York.

The original test included five OXBO employees in the sales department. To begin, ISS replaced the sales department’s Post Office Protocol 3 (POP3) e-mail service with the Microsoft Exchange 2000 Server messaging and collaboration server included in Microsoft Small Business Server 2000. Next, ISS installed Microsoft CRM and created a Microsoft CRM domain for pilot users, which was in addition to the OXBO corporate domain. However, it proved difficult for an employee using Microsoft CRM to use or print a file because the Microsoft CRM domain existed outside the corporate domain. So ISS executives decided that it would be beneficial to have Microsoft CRM on the OXBO domain so that Microsoft CRM users could access and exchange information with the rest of the company.

To accomplish this, ISS replaced Microsoft Small Business Server 2000 with the Microsoft Windows Server™ 2003 operating system. ISS also upgraded its messaging server from Microsoft Exchange 2000 Server to Exchange Server 2003. For remote access to e-mail, OXBO decided to implement Microsoft Office Outlook Web Access. For data storage, ISS recommended Microsoft SQL Server™ 2000, part of Microsoft Windows Server System™ integrated server software.

Next, OXBO upgraded all its desktop computers running previous versions of Microsoft Office programs to Microsoft Office Professional Edition 2003 with the Microsoft Office Outlook 2003 messaging and collaboration client. Each user was given virtual private network access so he or she could connect from anywhere to internal OXBO files using an Internet connection. Finally, ISS upgraded Microsoft CRM version 1.0 to version 1.2.

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Lisa Talbott, Sales Coordinator, OXBO International

## Benefits

With its new CRM solution, OXBO gained a centralized database to collect and organize customer information. The database also gives the sales force real-time inventory information, helping salespeople be more proactive in lining up potential sellers with buyers. Microsoft CRM helps the company segregate market segments and target customers based on each customer's current, seasonal, and future needs. The company's streamlined selling process has helped increase sales by 30 percent.

### Sales Force Increases Revenue by 30 Percent

In the past year, OXBO has increased sales by 30 percent, without having to add additional administrative people to support the sales force. “By having a central repository of sales information, OXBO has been able to do more with less,” says Lisa Talbott. “None of our salespeople have secretaries. They just have Microsoft CRM.”

### Real-Time Information Streamlines Sales Process

With salespeople scattered throughout the United States, it was important for OXBO to connect its sales force with up-to-the-minute sales information. “It is essential for us to have real-time information for salespeople on the road so that we don't end up selling the same piece of equipment twice,” says Andy Talbott.

One of the goals for investing in a CRM solution was to help the sales force be more proactive. When OXBO began its business, it had a core market with a small customer base. However, as the company grew and expanded its markets, it became increasingly difficult to keep track of customer information. In the past, when OXBO accepted customer trade-in, the used equipment would sit in inventory until the company could find a buyer.

The new solution helps change that scenario. “With all customer information centrally located in a database, including contacts, leads, and customer history, we are easily able to identify potential buyers across the country,” says King. “Microsoft CRM has helped us streamline our selling process to the point that, when we take a piece of equipment out of the field, many times we have already found a buyer for it.”

### Remote Access Saves Time

With its sales force located throughout the country and constantly traveling, OXBO has made it easier for salespeople to stay in touch. With the new solution, a salesperson can find a local business center, log on to Outlook Web Access, and access leads and equipment information in Microsoft CRM. In turn, that salesperson can upload into Microsoft CRM all the current information that he or she has gathered from sales calls. “Microsoft CRM has given us much greater manageability over the retail side of our business,” says Lisa Talbott. “To be able to access Microsoft CRM over the Web using Outlook Web Access is a huge benefit for us.”

Microsoft CRM also helps OXBO save time. For instance, if a salesperson is looking for used equipment for a potential buyer, he or she can enter information into Microsoft CRM. The information is centrally located and available to the entire sales force without that individual having to send e-mail or make phone calls. “When I need equipment, I can look in Microsoft CRM and see what is available just by doing a quick search. It eliminates a lot of phone calls and wasted time,” says King.

### Solution Helps Forecast Sales, Manage Customers Better

OXBO needed a way to segregate its diverse customer base because each market needed to be managed differently. For instance, many customers have seasonal businesses.

## For More Information

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For more information about ISS Group products and services, call (973) 812-9700 or visit the Web site at: [www.issgroup.net](http://www.issgroup.net)

For more information about OXBO International products and services, call (585) 548-2665 or visit the Web site at: [www.oxbocorp.com](http://www.oxbocorp.com)

"From a management point of view, Microsoft CRM gives us the opportunity to forecast potential sales and manage our inventory so that at any one time we can have the minimum dollars required invested in our inventory," says Don Britt, IT Manager (Eastern Technical) for OXBO International.

As an example, in summer 2004, a salesperson made a visit to a California winery and was informed that the winery wanted to trade in its current grape-harvesting machinery for new equipment in several months. The salesperson entered this opportunity in Microsoft CRM, and a buyer was found before the equipment became inventory. "With the value of the capital goods we are dealing with, if we are not careful we can get stuck with millions of dollars' worth of equipment in inventory," says Andy Talbott. "Microsoft CRM helps us tightly manage our inventory."

As the dollar savings mount up, OXBO plans to add additional Microsoft CRM functionality such as quotes and forecasting. "Moving forward, as our salespeople continue to experience the benefits of Microsoft CRM, they are eager to take it to the next level," says Lisa Talbott.

## Microsoft Business Solutions

Microsoft Business Solutions offer integrated business applications and services that allow small and midsize organizations and divisions of large enterprises to connect employees, customers, and suppliers for improved efficiency. The financial management, customer relationship management, supply chain management, and analytics applications work with other Microsoft software, including the Microsoft Office System and the Windows® operating system, to streamline processes across an entire organization. This gives businesses insight to respond rapidly, plan strategically, and execute quickly. Microsoft Business Solutions are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company's needs.

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### Software and Services

- n Microsoft Business Solutions
  - Microsoft CRM
- n Microsoft Office System
  - Microsoft Office Professional Edition 2003
- n Microsoft Windows Server System
  - Microsoft Windows Server 2003 Enterprise Edition
  - Microsoft Exchange Server 2003
  - Microsoft SQL Server 2000

### n Technologies

- Microsoft Office Outlook Web Access

### Partners

- n ISS Group

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