



Industrial Equipment Company Strengthens Services and Sales with CRM Solution

Overview

Country or Region: United States

Industry: Professional services—
Architecture, engineering, and related services

Customer Profile

Yokogawa Corporation of America (YCA) is a leading manufacturer of test, measurement, field instrumentation, and process control systems in North America.

Business Situation

Looking to expand its support services business, YCA wanted to bolster its customer service with better service activity tracking and a customer self-service portal.

Solution

Working with Microsoft Gold Certified Partner SalesMetrix, YCA implemented Microsoft Dynamics CRM for its support and field services teams.

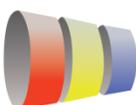
Benefits

- Greater customer satisfaction
- Seamless customer experience
- Proactive support services

“With Microsoft Dynamics CRM and SharePoint Server, we have the tools we need to match and potentially surpass our competitors in terms of customer satisfaction.”

Sébastien Chambert, General Manager of Business Operations,
Yokogawa Corporation of America

Recognized for the quality of its measurement and process control equipment, Yokogawa Corporation of America (YCA) is expanding its services business in North America, where its competitors have larger services operations. To meet the demands of important customers and increase its competitive position, YCA implemented Microsoft Dynamics CRM with help from Microsoft Gold Certified Partner SalesMetrix. YCA replaced inefficient manual processes with automated workflows and laid the foundation for a 360-degree view of customer activity at the company. Now, the company’s solutions sales team has the visibility it needs to better manage customer accounts and find new opportunities. The implementation of the business management solution helped YCA win a large contractual agreement that exceeded the solution’s deployment costs.



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Situation

[Yokogawa Corporation of America](#) (YCA), headquartered in Houston, Texas, is a leading manufacturer of test, measurement, field instrumentation, and process control systems, as well as a fast-growing provider of solutions services in the oil and gas industry. YCA is the North American subsidiary of Yokogawa Electric Corporation, a global industrial-automation conglomerate with more than 19,000 employees in 33 countries.

Long recognized for the excellence of its product offerings, YCA is quickly growing its field services business in North America, where it competes against vendors with larger services operations. “In regards to services and solutions sales, the opportunity for us in North America is quite significant,” explains Sébastien Chambert, General Manager of Business Operations at YCA. “Through comprehensive offerings that cover the entire life cycle of equipment, we help our customers achieve safe, reliable, environmentally friendly, and profitable operations.”

Oil and gas producers and other industrial customers rely on services from YCA to keep operations running smoothly. “Our services customers pay us to protect against interruptions in their operations,” says Chambert. “If an oil platform has to go offline because of equipment difficulties, it can mean millions of dollars in lost production.”

The services group at YCA helps prevent or minimize such outages. Support teams based in Sugar Land, Texas, and Newnan, Georgia, provide expert after-sales support to customers over the phone—resolving approximately 1,000 cases each month. For issues that require on-site technicians, the support group dispatches field services teams from regional centers, tracks the

hours spent on those calls, and monitors important asset-tracking information. In addition to responding to problems, the support team answers customer questions regarding their service history, which is why asset tracking is vital.

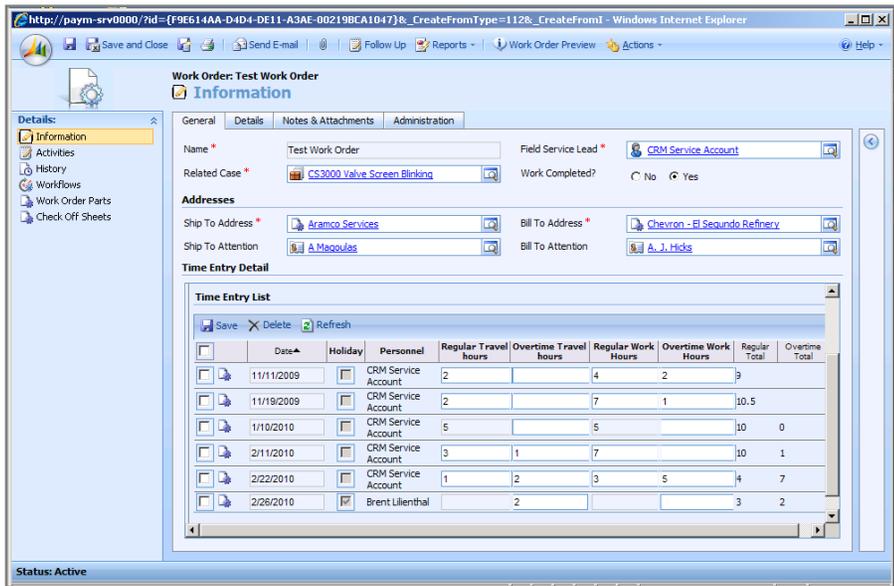
The group used an old business management solution as a call-handling database but tracked service hours, assets in the field, and contract renewals in separate applications. None of these systems were available to customers for self-service or to the sales and account teams. When customers or account managers needed service histories, the YCA services group spent an inordinate amount of time collecting information from the disjointed applications.

“As the services opportunity in North America continued to grow, we understood that we needed a more modern solution that would enable us to provide a higher level of customer service,” says Chambert. “The situation became more urgent when one of our large customers made it a contract requirement that we provide self-service access to service histories. Clearly, that required a single solution.”

Solution

YCA decided to implement [Microsoft Dynamics CRM](#) in its solutions sales operation, which is distinct from the services group but shares many of the same customers. “It was a logical step to extend that solution for our services operation,” says Chambert. “We talked with our partner, SalesMetrix, about how to build a solution that would provide a near-real-time, 360-degree view of customer activity.”

To design the services solution, YCA borrowed design and process templates from Yokogawa Engineering Asia, an



Field services technicians record time, parts, and other expenses onsite in offline mode or while connected to the Internet.

affiliate in Singapore that has [experience implementing support-oriented solutions using Microsoft Dynamics CRM](#). [SalesMetrix](#), a Microsoft Gold Certified Partner, assisted the services group at YCA with the implementation, including configurations that streamline the flow of services activity from the field to the back office and then to customers and account managers. Previously, SalesMetrix had deployed Microsoft Dynamics CRM for the solutions sales group at YCA. The solution sales and the services deployments share consistent customer contact information, which facilitates cross-departmental collaboration.

“Previously, we had no systematized way of tracking customer identities,” says Dan Dorn, Senior Systems Support Engineer at YCA. “Employees would record contacts differently, so we were unable to consistently track activity with individual accounts. The customer entity framework in Microsoft Dynamics CRM eliminates that

confusion—not only within our group, but across whatever groups that have access to the system.”

YCA and SalesMetrix configured Microsoft Dynamics CRM to make the most of on-site field services visits. Now, when technicians respond to a services call, they use the solution running on tablet PCs to record their activity, potential sales opportunities, and even fill out invoices with electronic signatures from the customer. The solution works in offline mode when Internet connectivity is unavailable; once connected, Microsoft Dynamics CRM automatically uploads the information to YCA’s servers.

By streamlining the capture and upload of information, YCA dramatically reduced the burden of processing paper forms. The company recently finished implementing a new ERP system and anticipates connecting it with Microsoft Dynamics CRM for even greater efficiencies. The primary goal of this automation, however, lies in speeding the flow of information from the field to the back office, account managers on the solution sales team, and customers through a self-service portal.

YCA worked with SalesMetrix to set up a self-service portal for customers based on Microsoft SharePoint Server. The portal controls access to information based on people’s roles. For example, facilities engineers can view their cases that they are involved in and regional managers or executives can view all open cases associated with their services accounts. YCA plans to make product documentation and other assets available through the portal as well.

In a similar manner, sales managers at the solutions sales group at YCA receive updates and alerts through Microsoft Dynamics CRM for their accounts. This

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Will Moseley, President, SalesMetrix

Technicians gather electronic signatures in the field to expedite the service-to-cash process.

includes alerts regarding potential sales opportunities identified during on-site visits by technicians. YCA is also setting up the solution to track contract renewals.

Benefits

Equipped with a single, modern solution that tracks sales and service activity, Yokogawa Corporation of America won a significant contract with a major oil and gas producer that exceeded the company's investment in Microsoft Dynamics CRM. “Implementing the solution was key to winning this contract,” says Chambert. “If you count that revenue against the cost of the project, our return-on-investment was 250 percent. And, that's without the efficiency gains that we expect to grow as the deployment gains momentum.”

Greater Customer Satisfaction

As it competes to take market share away from larger rivals in North America, YCA is increasing its customer service capabilities

with projects like the customer self-service portal that runs on Microsoft Dynamics CRM and SharePoint Server. Automatically captured information, electronic invoices, and comprehensive account information all contribute to greater customer confidence in YCA.

“In the services line of business, customer satisfaction is absolutely vital. It is what determines whether a customer renews their agreement or not,” says Chambert. “With Microsoft Dynamics CRM and SharePoint Server, we have the tools we need to match and potentially surpass our competitors in terms of customer satisfaction. These systems are critical for Yokogawa Corporation of America to capture the full support services opportunity in our market.”

Seamless Customer Experience

Before deploying Microsoft Dynamics CRM, YCA offered customers a fragmented experience. Now, the solutions sales and support services teams share up-to-date information about customer accounts through the solution.

“Information flows quickly from the field to the back office and our solutions sales team,” says Chambert. “We present a more consistent face to the customer and do a better job of capturing potential opportunities.”

Now, with a flexible solution in place, teams at YCA can easily share information. “By tying together sales, technical support, and field service operations with a single CRM solution, Yokogawa is streamlining operations, delivering fast customer response, and improving cross selling,” says Will Moseley, President at SalesMetrix. “The result is an integrated service experience for their customers.”

The screenshot shows a 'Work Order Preview' window with the following data:

| Date | | Holiday | Personnel | Travel Hours | | Working Hours | | Total Hours | |
|---------------------|--|--------------------------|---------------------|--------------|----------|---------------|----------|-------------|----------|
| | | | | Regular | Overtime | Regular | Overtime | Regular | Overtime |
| Monday | | | | | | | | | |
| Tuesday | | | | | | | | | |
| Wednesday | | | | | | | | | |
| Thursday 11/12/2009 | | <input type="checkbox"/> | CRM Service Account | 2 | | 4 | 2 | 9 | |
| Friday 11/20/2009 | | <input type="checkbox"/> | CRM Service Account | 2 | | 7 | 1 | 10.5 | |
| Saturday | | | | | | | | | |
| Sunday | | | | | | | | | |

Authorized Customer Signature: *Bill Stearn*
Date: 1/10/2010

Service Specialist Signature: *Michael...*
Date: 1/10/2010

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For more information about Yokogawa Corporation of America products and services, call 1 (800) 888-6400 or visit the website at:

www.yokogawa.com/us

For more information about SalesMetrix products and services, call (877) 77MSCRM or visit the website at:

www.salesmetrix.net

Proactive Support Services

Because technicians record all their activity electronically and it is associated with the right accounts, the support services group at YCA has much better visibility into the status of equipment and contracts than before. As a result, they can proactively assist customers.

"Now, all the relevant information is in one place for people to make decisions," says Chambert. "In addition, we've configured Microsoft Dynamics CRM to support our processes so that we can let a customer know about an add-on service or solution that is relevant to what they are dealing with at that moment or might face in the near future. By being proactive, we can provide better offerings to benefit our customers."

Additional Resources

- [Read more about Yokogawa services offerings for facilities operations.](#)
- [Read more about Microsoft Dynamics CRM service solutions.](#)

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:

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