

Main News



Topics:

- GrapeCity visits ECI-Metro Kunming
- GrapeCity presents CRM and distribution management solution (DMS) at CRM4.0 launch event

GrapeCity visits ECI-Metro Kunming

Recently GrapeCity China CEO Peter Macinnis paid a special trip to Kunming in Yunnan to visit ECI-Metro, one of GrapeCity's key CRM customers. Accompanied by Wang Peng, the CRM Product Marketing Manager of Microsoft, Peter met with Khun Supat Prueksaviat, ECI Metro Managing Director, and Kuhn Suriya Akdhakul, their marketing general manager to listen to their feedback on the current status of their CRM project, on the performance of GrapeCity's CRM team, and to solicit their advice on next phases of the project.



operation of these two systems is critical for us. We hold high expectations that the new system will add great value to our business and support our rapid development in next few years."

Based on his years of experience as general manager of a large machinery manufacturing company, Peter suggested to Kuhn Supat and the management team of ECI-Metro that they set up key measures for the CRM

project, in order to focus on the top three to five success indicators such as improving current sales coverage and sales close rate. Wang Peng of Microsoft introduced the new functions and improvements on Microsoft Dynamics CRM 4.0 which provides greater flexibility and advanced features to the business managers and improves the user experiences of the customers.

ECI-Metro's main business is providing sales and maintenance service for large Caterpillar machinery equipment in China, which are manufactured and shipped from overseas. Thus, it is very important for ECI-Metro's business operations and their further growth to have an accurate sales forecast. The management team intends to process purchasing in advance according to the sales forecast, thereby avoiding either a product shortage or unnecessary inventory.

ECI-Metro is one of four Caterpillar dealers in China. It was founded in mid-1995 and is wholly owned by two Thai conglomerates -- ECI of the Chia Tai Group, and Metro Machinery. ECI-Metro has more than 35 branches offices in southwest China covering eight provinces and one municipality. The Chia Tai Group together with its business partners is the largest foreign investor in China with more than four billion U.S. dollars invested, and has set up over 100 joint ventures with revenues of 80 billion U.S. dollars since 1998.

On reviewing the CRM project, Kuhn Supat said that, "GrapeCity and Microsoft have made significant progress in the current phase of this project, including integration with our CAT DBS systems. The stable

Business requirements:

ECI-Metro analyzed the situation of their sales and maintenance, and put together the following requirements:

- **Customer information and contact management:** In the past, ECI-Metro lacked effective management of potential customers. The customer information they had on record was based on information from order management, customers that had completed business or made down-payments. Moreover, key contact records were incomplete, making work difficult for sales people.
- **Sales forecasting accuracy:** As one of four Caterpillar dealers nation-wide, ECI-Metro's key business is the sale and maintenance of Caterpillar equipment. Given the long lead-time for shipping equipment from the US or UK, ECI-Metro

must walk a tightrope between having products when customers need them, at the same time avoiding unnecessary, expensive inventory. An accurate sales forecast is the key to managing this dilemma.

- **Monitoring customers' equipment:** construction equipment and parts have lifecycles. For ECI-Metro to be able to know when a customer's piece of equipment needs annual maintenance or is due for a replacement part or an overhaul is an important source of potential ongoing sales. To keep this information as a schedule in a CRM solution allows ECI-Metro to be proactive in contacting the

customer at the right time, both helping the customer keep their equipment in optimal shape and increasing ECI-Metro's sales.

- **Win-loss analysis of sales management:** ECI-Metro wants to have every sales effort (activity) captured and recorded, regardless whether the sale was finally won or lost. The company puts great emphasis on reviewing and analyzing each sales experience, and then drawing conclusions that can be used as guidance for future sales activities. In addition, having a good analysis of what works and what doesn't helps new sales staff master the essentials quickly.



Group News

April 3, 2008, Microsoft announced the launch of Microsoft Dynamics CRM 4.0, Chinese version, at the Shanghai Regal Hotel. As GrapeCity is one of Microsoft's aggressive CRM partners in China, Jack Li, the Solutions BU manager of GrapeCity was asked to present our CRM and distribution management solution (DMS) at the event.

The CRM and DMS solution uses Microsoft Dynamics CRM 4.0 as the core platform and integrates with a backend ERP system to manage internal operations of the company. At the same time, the solution helps companies connect with their distributors through a secure Internet interface, allowing real-time data and transaction exchange. The CRM system helps the company manage sales, marketing, and service. The Internet portal helps distributors manage their daily operations, including sales reports, inventory, AP and AR, and it gives the company an avenue to provide distributors critical information about their competitors and the market.

Using the medical equipment industry as an example, Mr. Li presented case studies on the daily management of sales activity, statistics showing market share and product penetration rates, and examples of how to solve issues like channel conflicts. The audience's response indicated that they were greatly impressed with the solution.

Solution -- Microsoft Dynamics CRM

After careful selection, ECI-Metro chose GrapeCity to implement Microsoft Dynamics CRM, to be used the following way to address their business challenges:

- **Forecasting deal volumes in the sales pipeline:** Unlike other industries, for heavy equipment sales, an accurate forecast of unit sales is even more important than forecasting total sales amount. ECI-Metro puts a high premium on statistical analysis of successfully closed deals. Using best practice data for heavy equipment sales in other countries together with Dynamics CRM, ECI-Metro sales can forecast the close rate at each stage in the sales process. This provides the ECI-Metro management team with a sales pipeline forecasting unit sales of heavy equipment.

ECI-Metro to manage customer information dynamically. Besides of basic contact information, Dynamics CRM can help the sales team to grant and identify the credit levels of the clients, so that sales person may pay more attention to the most important customers.

- **Marketing management:** The annual marketing budget and activity plan can be managed using the Microsoft Dynamics CRM marketing module. Marketing activities are scheduled and tracked. Using feedback data from each marketing activity, CRM assigns sales opportunities to the appropriate sales person.

- **Dynamic customer management:** Microsoft Dynamics CRM enables

- **Advanced reporting features:**

Benefits of CRM

ECI-Metro has experienced the following improvements since the CRM project (phase 1) was deployed on November 2007.

- **Integrated the processes of marketing and sales:** With Microsoft Dynamics CRM, ECI-Metro has standardized the processes used for sales and marketing. Every step in the sales process is recorded in the system, throughout the whole cycle from first contact with the customer to final deal closing and after-sales support, allowing the managers to supervise the whole process.



contact with potential customers from all kinds of interactions including events, phone calls, emails, website feedback and others. In addition, the system helps ECI-Metro generate new sales leads based on detailed customer purchasing records, like being able to proactively track the expiration date of the equipment and parts.

- **Exploring potential business opportunities:** ECI-Metro can now collect customer information on more than existing customers. With Microsoft Dynamics CRM, employees are alerted to business opportunities and they keep

- **Insight on the market and sales win-loss analysis:** Microsoft Dynamics CRM can also collect competitor data, tracking and analyzing the information to calculate the ECI-Metro market share. In each case, it is important to record the reasons for winning or losing a deal to provide the data to further analyze the strengths and weaknesses of the company, and to be the basis for adjusting market strategy.

- **Improve efficiency:** ECI-Metro employees are able to improve efficiency with the systematic work plan they can build in Microsoft Dynamics CRM, using the automatic reminders and assists of CRM to enable to execute well.

China's rapid economic development has created numerous business opportunities for companies. Microsoft Dynamics CRM is a powerful aide to the companies to gain success in rapid business development, with its outstanding performance on developing potential business opportunities, utilizing the customer resources, and improving service quality.