CRESTWOOD ASSOCIATES

Customer:
Trim A Door

Website:
www.trimadoor.com

Location:
Mishawaka, IN

Industry:
Cabinetry/Interior Doors/
Mill Work/Trim & more.

Profile:
Established in 2003.

"The frequent need to switch a customer's order around left some customers feeling like we were doing a bait and switch, which was completely untrue - it was just our crummy process!"
- Christian Hurley, TAD Operations Manager

"Dynamics CRM and Experlogix enables our field teams to create fast, accurate quotes . They can do more in less time. It's fantastic!"

- Christian Hurley, Trim A Door Operations Manager

THE COMPANY

Trim A Door began modestly, out of a garage 13 years ago, with just a man and a plan. Thirty-five employees later, Trim A Door operates out of a 100,000 sq ft building, and continues to grow even in a stagnant economy. Trim A Door looks at the horizon with fervor and aggressive growth goals.

THE CHALLENGE

When Trim A Door began to employ field salespeople in 2003, they were using pen and paper to create quotes and orders (and up until August 2013, they still were). There was no structure to it: if a salesperson searched for a product in the catalog and didn't immediately see the one they wanted, they would just enter in a new item. This created a mess of inconsistently named duplicate items. Also, between price lists, discount rates, and sales tax to calculate, there were ample opportunities to make quote-to-order mistakes."

Further, when quoting a door or set of doors, the field team had no idea which accessories were compatible, and ended up quoting hardware or windows that weren't even available for that style of door. The result was a messy sales process, with the salesperson frequently having to go back to the customer and say, "You were charged this, and should have been charged that." It was extremely cumbersome for the salesperson, and disappointing to customers. Worse yet, the refrain for a lot of orders was, "This door doesn't come with that hardware, but I can show you a different door." - Christian Hurley

THE SOLUTION

Trim A Door came to Crestwood determined to fix this process so that quotes can only be entered with correct hardware and other options, and to completely redesign their entire quote to order to invoice process. Dynamics CRM with Experlogix was the answer. Crestwood demonstrated the features and 2 minutes in, Trim A Door was sold.

THE BENEFITS

Efficiency
Since Trim A Door went live with the CRM & Experlogix integration in August 2013, their sales team has seen a significant increase in productivity. Additionally, the time savings make it possible for one person to do the job that previously took two! "We put the tools in their hands, and it just took off."- Christian Hurley, Trim A Door Operations Manager.

Accuracy
Quote accuracy has improved, and continues to skyrocket. The need to re-quote has decreased. Trim A Door is using over 2,000 rules and formulas in CRM, and it all ran smoothly and invisibly in the background. They love it, because these rules force them to do it right, while making it simple to do so. "Don't get me wrong, there is a lot of work we had to do, making sure we set up CRM with part numbers consistent with those in Dynamics GP. But we had some help - Crestwood transitioned all of our existing inventory information over into CRM; then we exported it into Excel, did a quick find/replace with any additional information, and shot it right back into CRM." - Christian Hurley

User Love
Trim A Door's sales team has been incredibly supportive of this solution and the results they see are reinforcing their commitment to Dynamics CRM. "Users who previously might grumble about using something new, no longer dread doing quotes, because it is so simple and they know they can't make a mistake. It's been an empowering experience for them, allowing for a confidence level we haven't seen before. One of our 20 year veteran employees is over the moon – said she's been waiting for this her whole life." - Christian Hurley

Seamless Flow to GP
Accounting is thrilled that they no longer have reverse orders, re-quotes, and a messy catalog. The data entered into CRM by the field sales team flows right over to the Dynamics GP full of duplicates, making fewer steps from quote-to-order to invoice. Everyone's happy.

"Overall, this has been a great experience, especially considering what they came from. We didn't want a system where we had to ask an outside resource to help us for every little thing. We really wanted the ability to learn and handle as much of the day-to-day adminis-tration of the system in-house. Crestwood was great with that, they preach it, and live up to it. Now it's all on us to finish it up and we feel confident we have the right tool for the job." -Christian Hurley

Christian offered some parting advice: "Don't even think about doing this without someone on your team that will facilitate and get the rest of the team on board. Along with hiring the right Dynamics partner, it's the best (and only) way to achieve success on a project like this."

If you would like to see how Dynamics CRM can save you time, money and resources, contact Tim Thompson at tthompson@crestwood.com.