

Earl & Brown Focuses on
Flawless Execution Using
Microsoft Dynamics CRM

Case Study

At A Glance

With thousands of accounts worldwide, Earl & Brown provides distribution, fulfillment, and marketing services to manufacturers, e-commerce companies, brick-n-mortar retailers, and two-way radio dealers. With its implementation of Microsoft Dynamics CRM, Earl & Brown replaced manual tools that were impeding the company's growth with automation and centralized customer master data for streamlined processes and real-time visibility.

Software & Services:

- Microsoft Dynamics CRM Online
- Armanino consulting, development and implementation services

Benefits:

- Eliminates manual, inconsistent, and delayed communication using email, whiteboards, Dropbox, and conference calls
- Streamlines processes to better meet service commitments
- Delivers real-time visibility into sales and account management activities

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VP of Operations
Earl & Brown

Business Challenge

Earl & Brown has a long history of delivering exceptional customer service and strategically staying ahead of the curve. The privately held company provides distribution, fulfillment and marketing services to major online sellers and retailers such as Amazon and Costco, as well as a wide network of dealers and resellers. Ranked as #1 for mid-sized companies on Oregon Business Magazine’s Top 100 Places to Work in Oregon for 2015, as well as a perpetual member of the “Inc. 5000 Fastest Growing Companies in the U.S.,” Earl & Brown continues to enjoy stellar growth.

With success comes challenges, such as scaling the business to support continued growth. “As we continue to grow with more customers, products and vendors, we’ve had to start breaking up traditional multidiscipline roles into separate ones,” says Michael Hansen, vice president of operations at Earl & Brown. “The result was that with multiple people now involved, we were spending a great deal of time using email, conference calls and Dropbox to share information and collaborate.” In addition, each sales person had his or her own contacts database, lead tracking processes, and ways of documenting customer conversations, making it difficult to share information easily with the rest of the team.

Timing is everything for a company in the distribution and fulfillment business and the manual efforts to share real-time data about partners, customers and vendors was limiting the ability of the company to maintain its commitment to flawless execution for its thousands of worldwide accounts. “We decided that we needed to implement a customer relationship management (CRM) system,” says Hansen.

Solution

Hansen and his team initially evaluated a handful of CRM vendors before deciding to deploy Microsoft Dynamics CRM for its ease of use and ease of customization by the company’s small IT team.

The next decision was to select a service provider for the implementation. “We interviewed a number of firms and Armanino was the clear winner,” says Hansen. “It was immediately evident that Armanino understood our business and our processes far better than the other companies we interviewed. CRM is totally in their wheelhouse.” Earl & Brown engaged with Armanino to implement the new CRM system and customize it to support the needs of discrete groups of users throughout the company.

With a deployment target date that landed during Earl & Brown’s busiest time of year, Armanino deftly handled the implementation and rollout to avoid impacting Earl & Brown’s fourth-quarter sales processes. “The key to success was Armanino’s understanding of our business, their CRM expertise, and the flexibility to launch during a high pressure time of year,” says Hansen.

Results

With the new CRM system in place, Earl & Brown employees no longer have to rely as heavily on Dropbox, email, spreadsheets, and white boards to track customer conversations and processes. “One of our users reported that with Microsoft Dynamics CRM, he’s gone completely paperless,” says Hansen. “Our users are benefitting from streamlined workflows for many of their day-to-day processes. Plus, we’re regularly finding new uses for the system.”

Hansen believes one of the biggest benefits the company is seeing is visibility. “Now with our new CRM, anyone who needs to understand what’s happening can see what conversations have taken place with a partner or customer,” says Hansen. “That is critical to make sure that we’re meeting our service commitments.”

While still in the early days of the rollout, Hansen sees many opportunities for taking advantage of the new CRM system. “The collective view of leads, opportunities, and the sales pipeline will be very beneficial,” says Hansen. “We’re just scratching the surface of what we can do to leverage the system to streamline and enhance our processes—everything from returns to document storage and accessibility.”

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Next Steps

Looking ahead, Hansen is anticipating integration of the company’s enterprise resource planning (ERP) system with the new CRM system. “We’re currently looking at ways we can use the CRM to compensate for process restrictions in our ERP system,” says Hansen. “And at some point, we’ll want to integrate the two.”

When it comes to the experience with Armanino, Hansen gives it a big thumbs-up, proving that Earl & Brown isn’t the only expert on on-time delivery. “Armanino is fantastic to work with,” says Hansen. “Armanino’s lead CRM consultant was very flexible, knowledgeable, and supportive, giving us assistance where and when we needed it and empowering us to be hands-on with the new system as quickly as possible.”

About Armanino’s Microsoft Dynamics Practice

Armanino is one of the largest Microsoft Dynamics partners in the nation as a value-added reseller (VAR) and implementation partner for Microsoft Dynamics CRM, Dynamics AX, and Dynamics GP. Additionally, the firm offers the Microsoft Dynamics AX for High Tech Industries™ Certified for Microsoft Dynamics (CfMD) solution. This product helps software and internet, semiconductor, medical device and electronics manufacturers to empower their sales forces, cut costs and time-to-market, improve forecast accuracy, and manage distributor relationships and supply chains. As a Microsoft Inner Circle member, Armanino is among the top one percent of partners around the globe.