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| Overview  Country or Region: Canada  Industry: Home Building/Construction  Customer Profile  Jayman MasterBUILT builds residential homes in Calgary and Edmonton for the multi-family and two-single-family market segments as well as starter and move up/estate homes.  Benefits   * Streamlined processes * Central management * Improved lead capture * Quick value from development * Rapid user adoption * Minimizing data inputs * Future improvements |  |  | “Microsoft Dynamics CRM 4.0 isn’t just CRM in the classic sense – it’s a platform for any application that we want to build. With features including web services and filtered views, we can create and push out functional applications that add value to business processes really quickly. It simplifies the whole process of adapting CRM tour business.”  Patrick Conway, Software Developer at Jayman |
|  |  | When Jayman MasterBUILT integrated CRM, ERP and its web site to offer customers online spec capabilities and pricing transparency, the company set a precedent in its industry. But Jayman wanted to simplify and streamline the process even further for both customers and for its own sales team. To achieve that goal, Jayman evolved to Microsoft® Dynamics CRM 4.0. With a flexible CRM-based development platform, Jayman can create and deploy applications that drive business value to improve its lead capture and deal management processes. |
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Situation

When Jayman MasterBUILT first implemented Microsoft® Dynamics CRM 1.2, the goal was to use Customer Relationship Management (CRM) as a sales system within its external web site and then integrate that with Enterprise Resource Planning (ERP). By integrating the three systems, customers gained the ability to spec homes and get pricing online, and sales could access that information to follow up on deals. Jayman was the first home building company in Alberta to offer full pricing disclosure on its web site, which became a significant competitive differentiator for customers and prospective sales professionals.

While the system worked effectively and achieved the desired goals, Jayman wanted to further simplify the process for both customers and sales. “The way we set up the process, it was basically two systems – one marketing system and one sales system,” says David Schulz, Director of IT at Jayman. “We wanted to simplify customer accessibility and sales interaction with the system. Moving to one system from two would definitely increase efficiency and

save time.”

Jayman was also experiencing limitations in the terminology that it could use for certain data fields on online forms. To eliminate these limitations, Jayman wanted to evolve its CRM system to act as a data management layer in between the ERP system and the web site. This way, Jayman could gain greater control over the information appearing on the web site.

Solution

Jayman launched its new web site, supported by a Microsoft Dynamics CRM 4.0 backend, in March 2010. With the functionality inherent in the new version, Jayman was able to target improvements in its lead capture and deal management.

Customers can register and save a home to their favourites on Jayman’s web site, which initiates a follow up procedure within CRM. Sales people gain access to the information within a customer’s favourites, giving them a greater understanding of community, model, elevation, options and lot preferences. Sales people can also use customer favourites as inputs for sales agreements, home specifications and sales contracts.

Administrative sales processes are then managed through a series of CRM workflows that initiate notification and tasking of various departments and third parties involved in the sale of a home.

“Using Microsoft Dynamics CRM 4.0 web services and views, we built a wizard to guide sales people through every step of a deal,” says Schulz. “From any form, a sales person can click to view the status of the deal and the next steps required to get deal sign off.”

The platform flexibility is a welcome addition for Jayman’s development team. “The web services and filtered views in Microsoft Dynamics CRM 4.0 were a huge draw for me when I first saw the solution,” says Patrick Conway, Software Developer at Jayman. “We now have a platform for any application that we want to build so it’s easy to add custom entities. We can customize our system to fit our business, instead of having to change our business to fit the technology.”

Because much of Jayman’s lead capture and sales processes rely on the customer’s web site experience and information inputs, the flow of data points through its system was critical for process efficiency and expediting deals. By transitioning from unstructured Word-based sales documents to CRM reports and data, Jayman can now capture all customer information as structured data points. With this capability, Jayman has gained proactive insight into its customers’ purchasing interests

and preferences.

Benefits

By evolving its system to Microsoft Dynamics CRM 4.0, Jayman has improved its lead capture process and the efficiency of deal creation.

***Streamlined processes***

With one system, sales people only need to enter data once, saving time and effort. It’s also easier for customers to interact with the system, input data points, configure their homes and get accurate pricing.

***Central management***

Jayman now has greater control over the information that appears on its web site and how to present it, eliminating the previous verbiage limitations posed by the

ERP system.

***Improved lead capture***

Because customers can self qualify on the web site, sales can access a lead as soon as the customer registers online. With the structured data points, sales can leverage the original customer data inputs to populate required deal forms automatically.

***Quick value from development***

Leveraging the web services and filtered views in Microsoft Dynamics CRM 4.0, development can focus on adding value to business processes. The ease and speed of deploying functional applications helps to simplify adapting CRM to Jayman’s business.

***Rapid user adoption***

Microsoft Dynamics CRM 4.0 offers Jayman users a familiar Microsoft® Outlook® 2007 experience, helping to speed time to productivity while enabling improved interaction with data.

***Minimizing data inputs***

Processes including documenting unanticipated customer changes and design centre requests (flooring, tile, carpet, paint) are no longer done manually. Instead, that information gets entered right into the deal once, saving time and improving accuracy.

***Future improvements***

Functionalities including Microsoft® SharePoint® Server integration and workflow automation are future considerations for Jayman. The company would also like to link web analytics data with leads for more strategic marketing programs as well as track all customer-facing interactions (sales, service and marketing) within the system. Jayman is also considering the development of a CRM-based service management process that will enable customers to see contacts and building progress online.

Microsoft Dynamics

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| Hardware   * HP Procurve 5400zl * 2 x Equalogic PS 6000 SAN * HP BladeSystem c7000 | Software and Services   * Microsoft® SQL Server® 2008 R2 * VMware 4 * Microsoft Dynamics CRM 4.0 * Windows Server® 2008 Datacenter |

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For more information about Jayman MasterBUILT products and services, visit the Web site at: [www.jayman.com](http://www.jayman.com)

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.

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