



Refurbishing Company Takes Next Step and Implements CRM to Grow Business

POSRG aims to continue to build better relationships with their existing customers, develop new ones, and expand its business throughout the North America and beyond. POSRG believes the Microsoft Dynamics CRM solution will enable them to continue to grow the business and provide high quality service to its customers.

Results

- Improved account management and sales opportunity tracking
- Tracking Performance (KPIs):
 - Higher quality customer services
 - Integrated email marketing
 - Improved internal operations

Industry

- Refurbishing, Recycling

Country or Region

United States

Customer Size

100+ employees

Number of Users

30 employees

Connect with POSRG



Partner



"We've always has a successful business strategy. This is the next step in maturing our business. The Microsoft Dynamics CRM solution will help us continue to grow our relationships with our existing customers and develop new ones."

Ken Testa, CEO, POS Remarketing Group, Inc.

POS Remarketing Group, Inc. (POSRG) is one of fastest growing company in the refurbished point-of-sale equipment industry. Leadership attributes the company's success to the ability to assess market demand quickly, act on the markets swiftly, and build great relationships with customers. With its growing business, POSRG wanted to centralize customer information, including sales, marketing, service, and internal operations to improve sales performance and provide customers with the best possible service experience in fulfilling customer orders and service requests.

"We've always had a successful business strategy," says Ken Testa, founder and CEO of POSRG. "This is the next step in maturing our business. The Microsoft Dynamics CRM solution will help us continue to grow our relationships with our existing customers and develop new ones. To reach that next level, our challenge is to connect prospects and customers with our internal departments. Automating processes will empower us to touch customers at a more rapid rate and continue to meet our KPI goals. Our connection with sales and operations has drastically improved and customer support is much higher level with the new CRM solution."

Situation

Founded in 2005, POSRG is a supplier of certified refurbished point-of-sale products and support services to more than 3,000 organizations in every major vertical global market and provides solutions worldwide. POSRG's innovative solutions provide its customers a lower cost of ownership, providing the most value and reliability by supporting customers' hardware investment.

Over the years, the POSRG sales team was using ACT contact management tool to track and manage POSRG prospects and customer information and also to track sales team's sales activities. However, it was becoming



"I wanted a solution that my team can use to manage customer information and sales pipelines and one that management can use to easily track and monitor teams' progress from central dashboards."

Ken Testa, CEO, POSRG

evident that not all of the sales team members utilized ACT to track their customer information and activities because ACT tool was not able to provide the functionality needed for the business to grow. "I wanted to enable my sales team to be more productive and effective in selling and serving our customers by adopting and applying best practices," says Testa. "I wanted a solution that my team can use to manage customer information and sales pipelines and one that management can use to easily track and monitor teams' progress from central dashboards."

In addition, POSRG's internal systems were disjointed. Much of the communication was taking place via emails or by physically walking over to departments to hand over information. And, there was lack of processes and automations to effectively handle customer inquiries, service requests, order status follow up, production schedule handling, and so on. There were major disparities in communication and it was affecting productivity.

Solution

POSRG was growing rapidly and Testa saw the need to replace outdated systems and improve business processes to allow the organization to continue to grow. The company then engaged Riics, Inc., Microsoft Dynamics CRM Certified partner, to assess, recommend, and create an effective CRM/XRM solution that would address the existing and future business process needs of the growing organization.

Microsoft Dynamics CRM was positioned as the central data repository and provided a consistent front-end user interface (UI) for the employees to capture, track, and manage their sales and service interactions with their prospects and customers. In addition, XRM functionality was leveraged to incorporate Production Scheduling and Inbound Shipment Audit functions of the business into the CRM solution to provide a comprehensive overview of the customer.

The Microsoft Dynamics CRM solution was then integrated with the POSRG website, Fishbowl Inventory Management Application, custom Production Line (.NET) application, and a number of add-on applications to address the business needs of POSRG.

Results

Improved Account Management and Sales Opportunity Tracking

"The Microsoft Dynamics CRM solution has given our sales group the ability to manage our existing accounts efficiently and to contact prospective clients with ultra-specificity to increase our probability of closing new business," says Peter Varey, Director of Sales at POSRG. "Our sales team can now find practically every answer they need by looking in Microsoft Dynamics CRM. They can recall all of their interactions with each account or lead, update account information instantaneously, track buy & sell opportunities, and communicate special needs with other departments."

"The Microsoft Dynamics CRM solution has given our sales group the ability to manage our existing accounts efficiently and contact prospective clients with ultra-specificity to increase our probability of closing new business."

Peter Varey, Director of Sales,
POSRG

"Microsoft Dynamics CRM was originally intended to aid and improve the sales team's performance, but we were pleasantly surprised to see huge benefits gained by our Operations Department."

Jim Remke, CRM Project Manager,
POSRG

Ability to Track Performance (KPIs)

The Microsoft Dynamics CRM solution enabled the POSRG management to easily create and manage KPIs to track sales, service, and operations performance. In addition, some of the real-time dashboards helped users to get the big picture of their workloads and progress, which allowed them to better manage and improve on individual performance.

Higher Quality Customer Services

"Because of Microsoft Dynamics CRM, the POSRG service team can confidently track and manage each service issue from the moment it is created until the moment it is resolved," says Keith Ross, RMA/Repair Specialist. "Through automated process workflows, Microsoft Dynamics CRM allows us to broadcast automated updates on each case to both the customer and the account owner so that they have up to the minute knowledge on information such as case status and tracking numbers. This reduces the need for customers to follow up on service requests and ultimately enhances customer satisfaction level."

Integrated Email Marketing

"The expansive email marketing capabilities of our CRM solution allows sales reps to easily touch each of their accounts in a systematic yet personal way. By utilizing flexible marketing list queries, we are able to reach ideal levels of target marketing by creating focused marketing lists. And, the ability to track each customer interaction provides our sales team with instantaneous feedback," says Jim Remke, CRM Project Manager at POSRG.

Improved Internal Operations

"Microsoft Dynamics CRM was originally intended to aid and improve the sales team's performance, but we were pleasantly surprised to see huge benefits gained by our Operations Department," says Remke. "Scheduling inbound and outbound shipments, creating PO audit and SO production schedules, and live sales order tracking are just a few examples of the efficiencies that Microsoft Dynamics CRM solution put in place for our operations team."

Partner for Success

"Having a partner to consult and guide us through the implementation and customization of Microsoft Dynamics CRM was instrumental to the successful CRM user adoption at POSRG," says Remke. "Riics, our implementation partner, took the time to consider all of our essential needs and enhancement requests, providing useful feedback and insights along the way to timely and effective solutions."

"Riics made us more structured, more professional, and more progressive company," says Testa. "They separated us from our competition."

Next Steps

- [Connect with Microsoft Dynamics](#)
- [Become a Dynamic Business](#)

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

This case study is for information purpose only.
MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.

Document published December 2013