

# Deployment Planning Process Reduces Risk and Speeds Up Solution Design and Development for Maxi-Lift

Maxi-Lift has salespeople, distributors, and customers in over 65 countries around the world that use its plastic elevator buckets and accessories. Outdated systems and spreadsheets are being replaced with Dynamics 365 Sales to enable better account management, quoting, pipeline transparency, and sales forecasting. New Dynamic's Deployment Planning methodology has mapped out critical paths, defined user requirements, and reduced the risk of expensive surprises during implementation, keeping the project scope intact – and costs under control.

**Addison, Texas-based** Maxi-Lift, is a big player in the niche market of plastic elevator buckets and related products and accessories.

“The New Dynamic Deployment Planning process takes a bit more time upfront, but it’s worth it. In an estimated scope of 800 professional services hours, we’ve added just 10 hours – just over one percent of the original estimate. That’s amazing in my opinion, and another proof point that we made the best choice going with New Dynamic for this project.”



– Matt Hanson, Vice President of Business Development

***Maxi-Lift Inc.***

The company offers more than 450 types of elevator buckets, in almost any size, color, style and thickness. According to Matt Hanson, Vice President of Business Development, there’s a pretty good chance that the grains and dry ingredients in the food on your table, at one point, were conveyed by a Maxi-Lift elevator bucket.

Hanson is proud of the company’s history and market share since it’s founding in 1973, but also admits there’s room for improvement.

“We’ve known for a while that we needed to upgrade our CRM, quoting, and order systems but getting started is the hardest part in a project like this,” Hanson said. “In order to be smart about scope and funding, we decided we first needed to clearly document our processes, workflows, and sales cycles to give this project a solid foundation to build from.”

Hanson engaged New Dynamic to perform the Dynamics 365 integration and implementation. Step one was capturing all business processes at Maxi-Lift – and its related business unit Southwest Agri Plastics – using New Dynamic’s Deployment Planning Services.

“New Dynamic came in with a proposal and deployment planning outline that impressed us,” Hanson said. “They were very specific about their scoping and estimates which I questioned at first, but then I saw their pre-workshop questionnaires and how detailed they were. They made us think through our business with good questions, and then put it all on paper for us, which allowed us to start with a solid agreement on what we’re doing and why.”

## Beginning With the End in Mind

The 20+ sales and marketing team members at Max-Lift manage hundreds of sales calls, quotes, and opportunities each month.

Hanson has a vision for creating transparency and seamlessness across the company but needed a holistic approach and methodology for planning it and getting it done correctly. New Dynamic's process was exactly what he was looking for.

"We've got information flowing in a lot of directions here and New Dynamic has done an excellent job helping us map it, organize it, and understand it so they can build exactly what we need for our business," Hanson said.

New Dynamic's Deployment Planning Services began with a 10-page questionnaire designed to collect details on Maxi-Lift's sales process, lead qualification, opportunity management and quoting workflow. The information requirements for accounts, contacts, orders, and tasks were also gathered.

"The New Dynamic team summarized it all and then presented an implementation plan that included solution architecture, deployment model options, tasks, and timelines," Hanson said. "In the end, it gave us the confidence and trust to move

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forward with the full implementation plan. It was thorough and comprehensive and custom designed for our business."

Hanson said the New Dynamic team has made the project practical and easy to understand. There are two planned phases so far: Phase 1 will focus on getting Dynamics 365 Sales implemented and integrated; Phase 2 will add in additional sales and marketing tools for database prospecting, email campaigns, and lead nurturing activities. Ecommerce modules are planned for 2022.

"Soon, we'll be able to see all of our biggest customers and their ordering activity in a single view with just a few clicks in Dynamics 365," Hanson said. "We'll be able to save thousands of hours and do much more cross-selling across our customer base. These are both gamechangers for us."

As for the value of the Deployment Planning Services, Hanson, a Texas A&M-trained economist, can quickly quantify that as well.

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## Pains & Gains

### Pains

- Accounts, quotes, opportunities, and sales forecasting were too difficult to manage and keep up to date.
- Legacy systems and spreadsheets took too much time to populate and distribute.
- Single views and insights into large customer quotes and order activity didn't exist.

### Gains

- New Dynamic's Deployment Planning Services required Maxi-Lift to think about all aspects of sales, marketing, quoting, and ordering – and document those workflows, along with ideal workflow configurations.
- The KPI's for multiple Maxi-Lift business units will now be accessible in a single instance of Dynamics 365.
- New Dynamic's Deployment Planning Services have kept scope changes to a minimum – less than 2 percent of original estimates – and reduced the risk of errors and omissions for the entire project.