

Rapid Deployment of Dynamics 365 Drives Rapid Productivity and Value for Herzog

Rail and heavy/highway contractor Herzog manages projects and opportunities across North America. Spreadsheets and a legacy CRM system made it difficult to enter, track and report on opportunity communications and tasks. New Dynamic's D365 Rapid Deployment Methodology added instant structure to the sales process and improved collaboration among Herzog business development teams.

The clock was ticking for Brittany Rempe.

Executives at St. Joseph, Mo.-based Herzog wanted to improve client communications and pipeline management for two key business units – Herzog Railroad Services Inc.(HRSI), and

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– Taylor MacDonald, Marketing Manager

HERZOG

Herzog Technologies Inc. (HTI) – and they wanted to get up and running quickly on Microsoft Dynamics 365 CRM.

As a marketing communications coordinator for Herzog, Rempe was familiar with Dynamics 365 but wasn't sure how best to roll it out for the 15 business development managers across the two business units.

Rempe and Herzog executives brought in New Dynamic to gather requirements, chart business process flows, and implement the D365 solution using its Rapid Deployment Methodology.

“We were starting from ground zero with D365 and didn't need any complicated customizations, so the out-of-the-box functionality was exactly what we needed to begin with,” Rempe said. “New Dynamic's Rapid Deployment model gave us structure, guidance and training so we could show our executive team quick progress and immediate benefits.”

Faster, More Accurate Visibility to Leads, Contacts and Opportunities

HRSI and HTI manage multimillion-dollar opportunities all over North America. Business development leaders for the two divisions are also spread across the continent which puts them closer to customers but further away from their more centralized marketing, finance, and operations colleagues.

“Getting our remote offices and their business development activities all into one view is consistent with our One Herzog initiative,” Rempe said. “One view, one source of information, and one reporting format was the goal for speed and simplification.”

New Dynamic’s Rapid Deployment implementation began with stakeholder interviews and process mapping. The information requirements for contact management, task tracking, forecasting and opportunities were captured and light customizations to D365 were applied.

The primary scope of the Rapid Deployment engagement included Accounts, Contacts, Leads and Opportunities.

“The Rapid Deployment model was perfect for us,” Rempe said. “Our situation was straightforward, and we could take advantage of New Dynamic’s many years of experience and best practices in lead management, activity reporting and pipeline stages. Their leadership gave us a head start on driving the productivity and visibility we wanted.”

Taylor MacDonald is the Canadian Marketing Manager for Herzog and provided additional sales and marketing input for

Pains & Gains

Pains

- Opportunity spreadsheets and activity reports were difficult to manage and maintain.
- Difficulty in sharing sales activity levels and communications with the executive team.
- Legacy systems and spreadsheets required numerous steps to add and update records.

Gains

- New Dynamic’s Rapid Deployment Methodology allowed Herzog to begin using the out-of-the-box functionality of Dynamics 365 quickly and efficiently.
- Executives and department leaders have a more current view of field-level sales activity and customer interactions.
- Business development teams can enter and record information on Accounts, Leads, Contacts and Opportunities in half the time it took them with legacy systems and spreadsheets.

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HERZOG

the Rapid Deployment process. MacDonald said the New Dynamic team made the project easy.

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MacDonald said the productivity and speed gains have been remarkable, too. He estimates business development managers can now enter new names, leads and opportunities in about half the time.

“What used to take us 15 or 20 clicks with our old systems now takes just a few clicks in Dynamics 365,” MacDonald said. “It’s simple and clear, and saving us dozens of hours each week in terms of administration, marketing and sales management.” ●

New Dynamic
913.402.4599
NewDynamicllc.com

