

Maxi-Lift Integrates Dynamics 365 Sales with Business Central to Streamline Quoting, Cross-Selling – and New Sales

For more than 50 years, Maxi-Lift elevator buckets have been used to move everything from aggregate to zinc, in more than 65 countries around the world. To eliminate double-entries and manual data imports between its ERP and CRM systems, Maxi-Lift chose New Dynamic to integrate Dynamics 365 Business Central with Dynamics 365 Sales. The integration has simplified quoting, improved pipeline data, and helped lift overall sales significantly across the company's 27 product lines.

Continuous improvement is a crucial part of the culture at Maxi-Lift, the Addison, Texas-based maker of elevator buckets, belts, and accessories.

“The investment we’ve made with New Dynamic has paid for itself multiple times already in terms of time savings and the significant sales increases we’ve seen across our various product lines. We understand our customers’ needs better, we’re tailoring our quotes more precisely, and we’re doing more cross-selling. We had the vision to make Dynamics 365 the hub for all our selling activity and New Dynamic made it happen.”



– Matt Hanson, Vice President of Business Development

Maxi-Lift Inc.

Since 1965, the company has been developing new and innovative plastic solutions that offer durable and cost-effective alternatives to wood, wire, and metal. This commitment to innovation and quality has made Maxi-Lift the preferred supplier for the largest food, grain, and industrial companies in the world.



To keep its edge and continue to live up to its credo of “making it easier for our customers to do business,” Maxi-Lift recently upgraded its existing Dynamics 365 Business Central (BC) to enable tighter integration with Dynamics 365 Sales. The more seamless connection will speed up selling processes and give sales leaders at Maxi-Lift the insights they need to quote smarter, sell more, and ship faster.

Vice President of Business Development for Maxi-Lift Matt Hanson was the executive sponsor of the project.

“The upgrade and integration of our two core business systems – Business Central and Dynamics 365 Sales – is a huge boost in productivity for our sales and accounting teams when it comes to quoting,” Hanson said. “Quotes can now be generated by our sales team in a matter of minutes without involving our accounting team. It’s easier, faster and everybody wins – especially our customers.”

Hanson engaged New Dynamic to manage and implement this multi-phase project. The first phase involved the implementation

of Dynamics 365 Sales to improve lead, opportunity, and pipeline management. The latest phase focused on the integration of Dynamics 365 Sales with Business Central, using the Common Data Service integration solution.

“The integration between Dynamics 365 and Business Central was key for us from the beginning and New Dynamic made it happen as promised,” Hanson said. “Their grasp of our business process flow, their technical knowledge, and their project management were outstanding. The implementation was smooth, and we’ve already seen higher productivity from our sales teams and strong returns on our investment.”

Quoting With Speed and Intelligence to Win More Deals

Preparing and sharing sales quotes is a daily activity for the 20+ Maxi-Lift sales professionals spread across the country and around the world. Quotes are authored by both inside and outside salespeople, and volumes can approach 50 or 60 quotes per day.

The quoting process must accommodate two scenarios – repetitive smaller orders; and larger more complex orders that require collaboration and input among senior sales leaders. Improved integration and automation between Dynamics 365 Sales and Dynamics 365 Business Central has made it much easier for Hanson and his team to create quotes, clone them for fast edits, and group them into a dashboard for better analytics and follow up.

Pains & Gains

Pains

- Data on wins and losses was limited.
- Quoting required too much time from the accounting team.
- Quote creation, cloning, and edits weren't easily accessible or controlled by the sales team.

Gains

- New insights into wins and losses by quote, by customer, give Max-Lift the guidance to price more competitively and communicate product benefits more clearly.
- The integration of Dynamics 365 Sales with Dynamics 365 Business Central makes it easy for salespeople to create their own quotes and sort by customer and product line.
- Cross-selling has improved, and sales are up significantly across Maxi-Lift's 27 product lines.

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“Our quoting before this project required too much manual entry, and too much time from our accounting team,” Hanson said. “Now our salespeople can create accurately priced quotes, edit line items as needed, and have them all grouped and tracked for timely follow up in Dynamics 365. It all synchs with Business Central for the latest pricing and availability, and our accounting team doesn't get involved until it becomes a sales order.”

In addition to the time savings, Hanson said quoting has become more intelligent as well, driving better decisions and more competitive opportunities.

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While the tighter integration between Dynamics 365 Sales and Business Central is the most significant new development in New Dynamic's work with Maxi-Lift, it's not the only one. The hundreds of leads captured each month by the Maxi-Lift website now flow directly into Dynamics 365 Sales and are automatically assigned to the right person by region and product line. Email marketing integration is also on the way.

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