

## Product Line Expansions Lead Formetco to Flexible CRM Solution

*Billboards have been an advertising mainstay for more than 100 years, though they first appeared in a format much different from today. After the introduction of the Ford Model T in 1907, roadways became the popular venue for advertising to newly mobile consumers. Since then, billboards have served the public by providing information about food, hotels, gas, real estate, sporting equipment and numerous other consumer goods. Today, technology advances have enabled companies like Formetco to deliver billboard product solutions in multiple formats that illustrate distinctive and visually appealing messages.*

*For more than 35 years, Formetco has led the market as one of the largest and most innovative full service suppliers to the outdoor advertising industry. In keeping with their market leadership position, Formetco continuously looks for ways to improve client relationships by offering the best products available.*

When Formetco expanded its product line, they knew certain criteria – such as the ability to track warranty and service support information – were crucial to addressing client needs. They also needed to track product history, related customer information and view complete customer activity in one system.

Formetco wanted to replace its Goldmine contact management system, as it was not only unable to handle their growing needs, but it had also reached user capacity. A new solution would have to accommodate changing needs – including an expanding product line. New tracking demands meant they also needed to abandon their manual spreadsheet process for warranty management. Neither the spreadsheet approach nor Goldmine are purposed for comprehensive customer profile and account views, so it made perfect sense to find a new solution for these critical business needs.

**Key component:** The new system needed to fully track all activity related to Formetco’s most popular and growing billboard categories: digital, triface and mobile. The system needed to bring continuity to Formetco’s internal teams so staff could keep pace with changing customer requirements based on specific product needs. Having comprehensive account information accessible to all who ‘touched’ customers was a requirement, not just a desire.

### Solution

Formetco’s director of IT, Daryle Ridley, began his search for a robust customer relationship management system. While attending a Microsoft-sponsored luncheon, Ridley met representatives from Customer Effective, a Microsoft Gold Certified Partner specializing in Microsoft Dynamics CRM. Soon after, the two companies met to discuss Customer Effective’s approach to CRM and how they could address Formetco’s specific situation.

*“We immediately liked Customer Effective,” says Ridley. “Without question, they demonstrated greater knowledge about CRM than any other source we reviewed. Based on this and a strong recommendation from our Microsoft solutions representative, we decided to move forward them.”*

Ridley formed a core team to address the project, including representatives from operations, sales and IT who would have influence on how the system would be used. Working with Customer Effective, the team set a project time line along with clear expectations pertaining to schedule, resources and budget. Weekly update calls and status report reviews ensured everything was executed according to plan.

Inside sales executive Elizabeth Nelson was a member of the core team and provided sales input for what they needed CRM to do. Nelson offered valuable suggestions on the type of information that was important for sales to track, manage and use on a daily basis.

*“CRM had to match well with our sales approach and serve as a tool to enhance our jobs,” says Nelson. “Customer Effective went out of their way to make the system work for us.”*

**Proactive approach:** Ridley says Customer Effective kept in constant contact with his team and listened closely to all questions that arose. They made suggestions to help Formetco strategize ways to get more out of CRM. They worked with Formetco to convert data from the Goldmine system to Microsoft CRM. Ridley attests that Customer Effective was instrumental in helping Formetco’s team understand the best ways to leverage CRM. And to ensure the new system included complete customer contact information, Customer Effective integrated CRM with Formetco’s existing Microsoft Great Plains system.

Once CRM was implemented and integrated with Great Plains, an initial pilot was planned to give the core team a month to get comfortable with the system. During this period, additional sales staff had opportunities to view the CRM solution and how it worked with the converted data from Goldmine. Overall, Ridley says the process was smoother than he and his team initially expected.

Nelson adds that Customer Effective was quick to reply to questions and very helpful with requested customizations. She attests that Customer Effective remained patient during the entire implementation and delivered on a big project that carried heavy demands.

“Customer Effective was very thorough and clearly demonstrated their CRM knowledge throughout the project implementation,” says Ridley. “We were impressed with them from the beginning. Their attention to detail – including consistent follow-up – was key to keeping us on schedule.”

### Results

Today Formetco users access Microsoft CRM for a variety of needs. Sales tracks all account activity within the system including transactions, pending deals, history and contact information. The service and credit departments can access similar information, but with views focusing on pressing issues, alerts and other customer service situations. And any user can access and track all contacts and activities for single or multiple accounts related to vendors, suppliers and other third parties. CRM captures any product issues that might arise as soon as they occur. Formetco tracks these ‘cases’ on an account and occurrence basis, which enables any team member to know how quickly these customer cases are being addressed and resolved.

“Having a full picture of an entire account and being able to know almost immediately what is going on with a customer is extremely valuable to our business,” says Ridley. “CRM provides full account history even if players, contacts or company ownership changes occur. This means nothing is ever lost in any change or transition.”

**Extra advantages:** The Formetco sales team takes advantage of CRM functions to improve their performance and internal communications. Common calendars keep everyone informed of schedules related to account contact plans, service or other activities. Email links to contacts via Microsoft Outlook help track electronic communication. Telephone contact logs housed in the system let users

instantly see call attempts and connections made with an account – whether to a single contact or multiple contacts.

Knowing customer and product issues are taken care of within CRM is a big relief to Jock Gibb, vice president of sales. Because CRM is integrated to Great Plains, Formetco has a single point of access to complete customer data.

Microsoft Dynamics CRM includes custom pricing for specific products and customers, which helps Formetco tailor communications. CRM also allows Formetco to perform trend analysis for products, providing management with valuable information based on product lines, customers and regional markets.

**Good change:** Moving from a limited system that had reached capacity to one that is able to flex and expand as the company grows has been good for Formetco. The company has embraced Microsoft CRM positively and welcomed the change.

“Our investment in Microsoft CRM was one we felt good about making,” says Ridley. “Having Customer Effective lead the charge made a huge difference. Their core team of specialists was instrumental in executing a well organized, timely and successful project rollout.”

Fine tuning Key Performance Indicators (KPI’s) and dashboard reporting is next on Ridley’s agenda. A customized sales pipeline dashboard will be used for forecasting and assist in future buying decisions based on customer demand. With specific KPI dashboard views, Gibb will have immediate snapshots of territory sales performance that will track activity for each rep. Management will have accurate data views on all product line performance and customer use. This type of intelligence will improve critical decision-making processes and ensure all customers are being properly serviced.

Formetco fully recognizes how important it is to respond to and anticipate client needs. After all, they’ve been a leader in supplying outdoor advertising products since the 1960s and have every intention of delivering innovative, quality products and materials to their customers for many years to come.

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