



## CASE STUDY

### CRM CUSTOMIZATION AND IMPLEMENTATION

#### QUICK FACTS

##### INDUSTRY:

- GPS solutions & hardware

##### SELECTION CRITERIA:

- Current & comprehensive expertise
- O365 integration
- Hassle-free customization

##### PLATFORM:

- HyperTeam CRM

##### TECHNOLOGY:

- Azure
- ASP.NET

#### CUSTOMER PROFILE

Our Client's company consists of two divisions. ArgoTrak, Inc. delivers a variety of GPS tracking solution and distributes GPS tracking hardware.

#### EXPECTATIONS

The Client's main expectations regarding the CRM:

- Replace paper based administration
- Easy to use
- Ability to track & manage orders
- Centralized location for all sales information

#### CHALLENGES

The Client was reliant on a paper based sales process that was time-consuming, required a great deal of resources, and had little flexibility. This sales process lacked an easily accessible and centralized location for all of their data, which often made it difficult to organize, share, track, and manage information. Additionally, all opportunities and orders triggered a complex process that required participation from a variety of departments. To coordinate and complete this process, the Client used paper checklists and assigned tasks verbally or through email. Overall, although this paper based system had worked in the past, the Client's rapidly growing business now demanded a high tech solution from HyperTeam.

#### ABOUT HYPERTEAM

Using their experience in both business and IT, HyperTeam's staff of knowledgeable consultants & highly trained programmers work together to develop enterprise Cloud applications that solve the most critical issues facing businesses today. With these applications, HyperTeam helps organizations all over the world improve performance in areas like sales, project/order management, HR, & customer service (just to name a few).

*HyperTeam is a Microsoft Certified Partner and ISO 9001:2008 Certified company.*

## HYPERTeam'S SOLUTION:

To help the Client overcome their challenges, HyperTeam successfully implemented a customized Customer Relationship Management system (CRM). This was done by:

- 1. Fully Understanding the Client's Needs** - Before implementation the Client's needs were assessed through several consultations that clarified their requirements, recognized their need for customization, and allowed our consultants to prepare system oriented flow charts for development.
- 2. Thoroughly Testing the CRM & Obtaining Client Feedback** - Prior to implementation, the customized CRM was tested by both HyperTeam programmers and the Client. Through these careful and exhaustive tests, we were able to ensure that the system was not only reliable and comprehensive, but that it also met the Client's needs completely.
- 3. Providing Unparalleled Support and Training** - At HyperTeam, we understand that implementing a solution requires more than just technical expertise, it also requires sound training and on-going support. That is why we offered the Client all-inclusive training and responsive support before, during, and after implementation.

## BENEFITS:

After implementation, the customized CRM benefited the Client in many ways...

- **Greater Flexibility** – the CRM's cloud technology now allows the Client to work anywhere, on any platform, and with any device.
- **Centralized & Easily Accessible Data** – the Client can now easily upload, share, track, and manage all sales information from one secure location. For example: customer information, order details, emails, documents, product lists, etc.
- **An Organized, Efficient & Transparent Sales Process** – each step of the process is recorded, tracked, and managed from the CRM. Several steps have been automated (external leads & payment information) and orders are now processed with custom checklists that alert departments to tasks and ensure efficiency and accuracy.

## EXPERIENCE:

The Client's insightful feedback and the exceptional work done by our team made it possible to customize and implement the Client's CRM. This project is a great source of pride for HyperTeam because, prior to implementing the HyperTeam CRM, the Client had struggled to find a comprehensive, affordable, and user-friendly system that met all of their unique needs. However, with a little creative thinking, a lot of hard work, and the Client's endless cooperation, we were able to deliver a CRM that fully met their needs, as well as secure a long-term relationship with a successful local company.