

Case study



Palintest®

Palintest – K3 CRM rejuvenates Palintest IT systems, boosting efficiency and service

CONTEXT

K3 CRM has a wealth of integration know-how demonstrated by a recent implementation for Palintest, a world leader in water analysis technology, designing, manufacturing and supplying a full range of high performance products for monitoring water quality in a wide range of applications.

Since the development of the world standard DPD method for validating water disinfection 50 years ago, Palintest has built a range of products applicable in drinking water, wastewater and swimming pool water testing applications, with a range of precision instruments and easy-to-use reagents developed specifically to meet these needs. Palintest also manufactures products for the industrial and process water sectors, soil testing and water disinfection. Crucially Palintest are able to simplify testing for key water and environmental quality parameters, enabling critical decisions to be made with confidence.

Palintest is an innovative company that prides itself on the quality of its products, customer service and support: "Purchase of a product is only part of the customer experience. We are dedicated to delivering the highest levels of customer service and support," is stated as the customer service ethos.

The company sought a dynamic system for its sales, service and marketing teams that would automate its CRM processes and integrate the activities with its Uniplan Enterprise Resource Planning (ERP) system. This new front-end would bring together data held on a number of separate systems allowing a much more cohesive approach to customer service.

THE CHALLENGE

A need for full visibility

With a tried and trusted ERP system looking after its lean-manufacturing, Palintest sought an integrated CRM system that could enable it to centralise the important customer sales and service interactions, such as efficient order management (which was previously handled by the ERP system) logging quotations, noting opportunities, and gain full visibility of communications whether from email, telephone calls, through the company's website and social media activity or through face-to-face meetings. To enable this, the system would need to integrate also with Palintest's Microsoft Office system, particularly with Outlook for email communications.

"We needed a modern system that would allow us to have everything in one place and provide full visibility across the business; that includes all the interactions we have at any time with our customers. Importantly, it would need to support all of our sales teams whether based in the office or working remotely across the globe" says Roland Winder, Customer Service Manager for Palintest.

Palintest looked at various CRM products and decided that Microsoft's product was the one that provided the best fit and also flexibility for future development.

"Microsoft's Dynamic CRM product also seemed to offer the best solution for integration with our ERP system and it would adapt to meet the changing needs of the business. Moreover, the K3 team provided the best demonstration of its capabilities, providing a working mini system following two consultations. K3 really pulled the stops out to answer our requirements; they simply understood our business" says Roland.

Important features and functionalities supported by the system are the ability to separate each customer by market sector and application so that the company could identify and link its products and communications to match customer need and interest.

"Following training we've been able to customise the system ourselves so that it works exactly as we want. For example, we've written some JavaScripts that help to identify each type of customer account visually using different coloured headers. This all adds to making it an easy user experience and helps with efficiency and productivity improvements," adds Roland.



Automation brings insight to sales, customer service and senior management

Palintest finds that a centralised system brings huge benefits in customer insight and experience management. This is particularly important when organisations have internal sales, field sales, customer service, compliance teams and external partners like Palintest. Delivering a consistently high level of customer service is easier to maintain when the information can be shared seamlessly across all relevant contact points.

In a fast moving international business, senior management can instantly see the key performance indicators and react to changes as required using the various standard and configured dashboards.

"The system dashboards give us instant access to important information such as the number of orders coming in each day, who is processing the orders, what stage they are at and so on. We couldn't do that before without writing SQL database queries; now all the information we need to manage the business is available to us in real-time."

Roland Winder, Customer Service Manager, Palintest

The CRM system is also being used to support and drive marketing activities such as e-mail, trade show/events or phone campaigns and it can monitor and measure their effectiveness and outcomes versus campaign targets. As an active user of Net Promoter Score (NPS) customer satisfaction surveys, Palintest has also integrated the NPS process into the CRM system to add further insight into customer feedback.

Visibility of sales, customer support and marketing activities is, therefore incredibly straightforward using the system. The management team has an instant and real-time overview of company/customer interaction and Palintest team members can see the detailed information relating to any customer issue. "Another useful feature of the system is the ability for the users to create their own reports. These can be very detailed, drilling right down to exactly what they want to know and present in the report. This simply wasn't possible previously" adds Roland.

Continued Development

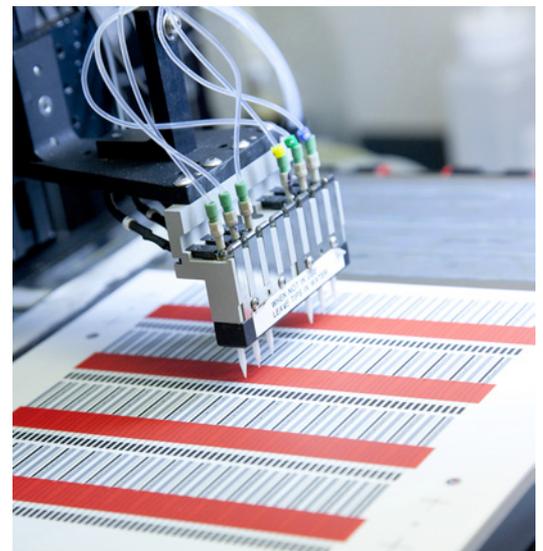
The initial focus of the introduction of the Palintest CRM system has been on streamlining the customer experience in relation to product purchase and technical query support. The next development is directed at integrating the information related to Instrument Service such as calibration records, service reminders and warranty management. In closing, Roland comments, "The new system is saving us a lot of time across the customer team; it really is much easier to access timely and relevant information to support the customer to the highest standard. This extra time can be spent serving our customers and developing our business."

BENEFITS

- Has integrated CRM with the ERP system bringing together data held on a number of separate systems allowing a much more cohesive approach to customer service.
- Centralises all customer interactions and delivers full visibility of customer communication from any source
- Provides comprehensive tracking of prospects as well as efficient opportunity, quotation and sales order entry
- Has comprehensive integration with Outlook for ease of use
- Supports the sales team in the office or working remotely across the globe
- Provides easy customer segmentation enabling the matching of products to customer interest
- Has significantly improved efficiency and productivity and delivers an "easy to use" user experience
- Provides Palintest with key performance indicators enabling them to react to changes as required using the various standard and configured dashboards.
- Supports and drives marketing activities and monitors their effectiveness.

"The new system is saving us a lot of time; it really is fast. We can access customer accounts instantly and process credit card payments without having to fill out forms from scratch as the system automatically populates them. All we need to add is the payment details. This speed allows us to spend more time serving our customers and developing the business."

Roland Winder, Customer Service Manager, Palintest



About K3 CRM

For more than 30 years K3 has helped businesses become more efficient, more effective and more profitable through identifying, then successfully implementing the right IT systems for their businesses.

K3 CRM continues in that tradition, bringing the benefits of cutting-edge Customer Relationship Management systems to clients across the UK and beyond.

Whether your business is small, medium or large our principal objective remains the same: to work alongside you, with you and, ultimately, to bring technology and CRM to your business in the most suitable way for you to build your business.

We do this by being expert in our fields, so you can make the most of being the expert in yours.

We seek to forge long-term relationships that are based on a thorough knowledge of your industry, sector and organisation.

Dynamics CRM can deliver value-added benefits across an entire organisation, and at K3 we identify where these opportunities lie.

If you are seeking an on-site, managed or hosted CRM solution; if you want to become more agile; if you want to harness social networks to broaden your customer service channels and become more responsive; if you want to make more of e-marketing; if you want to integrate CRM with your existing ERP package – K3 CRM can help you.

About K3

K3 is a UK centre of excellence for delivering solutions across a wide range of vertical sectors.

Over 600 customers rely on K3 to deliver powerful relationship management platforms across financial and professional services, manufacturing and retail.

With over 30 years of experience in development, implementation and support, K3 provides CRM in a number of flexible options including onsite, managed and hosted environments.

With more than 3000 customer installations in over 30 countries, K3 is recognised as a safe, innovative and reliable provider of world-class solutions, backed by world-class service.

**It all starts with a conversation, a presentation, a meeting or business review.
We have the solutions for you now, and we want to be
working alongside you in the future to continue to build your business.**

For an informal initial discussion on how K3 CRM can help you improve your business, please call contact us:
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