



## Empowering a team for more unified, profitable customer management

### Company Background

INMALO is a family-run business which has evolved over 65 years to become a leading supplier of Hydraulic attachments to the demolition, recycling and construction industries. In a highly competitive industry, INMALO has built and maintained a number of high-value customer relationships over the years, based on an in-depth understanding of their needs. John Polak, Managing Director, is leading a CRM transformation with the implementation of new technology and processes to support the business' future growth aspirations

### Challenges

Like many small to medium sized businesses, INMALO's customer management processes had evolved over time. Sales activities are largely managed by 2 individuals; both of whom maintain their own customer contact information and history within Outlook, supported by transactional information held in Sage. Whilst informal information sharing was taking place, without a central customer data source, inefficiencies were starting to occur.

As an increasingly fast-paced and mobile business, there was significant risk associated with individuals having to share information continuously just so that customer requests could be fulfilled by anyone within the organisation.

Witnessing a supplier's CRM system in action, was the defining moment for John. He recalls *"The risk around unintegrated information had been growing over time. When I saw what value CRM could deliver, I knew we needed to take that step. Even though we are a relatively small business, that total integration for office-based and mobile staff was critical for business development."*

### Finding the Right Solution

To give INMALO a platform for their evolving CRM strategy, John looked at a range of technologies. He comments *"We looked at Salesforce and other tools. We needed the best functionality, value for money and integration with our accounting system, Sage. Our impression of Salesforce was that it is really designed for larger organisations. It's quite complicated which would make it hard for staff to use and there were aspects of Sage integration that were going to be a real head-ache."*

Having already invested in Microsoft technologies, John looked closer at Dynamics CRM. Motivated by its integration with Microsoft Office 365, Sage and Microsoft devices, he approached Concise CRM for additional, specialist advice.

Following a series of demonstrations and discovery sessions, Concise CRM designed, configured and implemented a Dynamics CRM Online solution to give INMALO the immediate functionality they required, coupled with a roadmap for the future enhancements. Concise CRM supported and guided the data consolidation and import process, also ensuring the solution was seamlessly integrated with Sage, Microsoft Office 365 and the existing Windows Phones. *"The new solution went live very smoothly in less than 3 weeks. Concise CRM were very flexible and responsive, ensuring we completed each milestone efficiently and swiftly."* John enthuses



### Company Profile

- Plant & Demolition Equipment industry

[www.inmalo.co.uk](http://www.inmalo.co.uk)

*"Our Dynamics CRM Online solution is helping us to be more responsive to customers and to work quicker. We are equally effective in and out of the office with vital information at our fingertips. We're tighter as a team and we're winning more new business as a result."*

John Polak  
Managing Director,  
INMALO



INMALO's Dynamics CRM Online solution enables them to deliver a cohesive CRM approach blending sales pipeline management with historic sales information, providing:

- A single customer view – all customer information, quotations and service records dating back 5 years are held in one central location
- Dashboard insights – detailed dashboards have been created to show weekly and monthly views of new quotations, wins/losses and sales trends
- Efficient customer management – consolidated information enables all forms of new and existing customer management to be handled efficiently
- Mobile CRM capability – information is immediately accessible and shareable within CRM on laptops and through 4G mobile phones.



## Business Benefits

### Improved profitability

- Immediate views of quotes in progress enables INMALO to be more proactive in following up with customers, reducing the likelihood of opportunities being missed
- Faster sales cycles and improved success rates are boosting turnover and profitability
- Greater visibility of sales trends enables ongoing enhancements to be made to sales and customer management processes

### Customer service excellence

- With fast access to detailed customer information, requests can be satisfied immediately by anyone within the business
- A historic contact and transaction view enable INMALO sales managers to more readily identify future potential opportunities and services for customers

### Strong internal communication

- One source of customer information, supported by dashboard views, ensures everyone works with the same information minimizing cross-communication and potential errors
- Information sharing and team collaboration has been greatly enhanced especially amongst mobile and office-based team members

### Greater productivity in and out of the office

- With access to CRM on laptops and mobile devices, INMALO staff can be as productive when mobile as they are in the office, helping sales to be progressed quicker
- Cloud-based access to Microsoft SharePoint also ensures that additional customer documentation can be readily accessed, shared and updated on the move

## Greatest overall benefit...

*"The greatest overall benefit is perhaps the one we didn't expect – improved internal communications and team working. The new solution has made us much tighter as a team. Everybody knows what's going on with every customer at any one time. That's made it much easier to work together using one central set of reliable and up-to-date information. People are keeping in closer contact when they are out and about and overall it's had a great effect on the business." John concludes.*

"With most IT companies, you have to know the right questions to get the right answers. Concise CRM openly and honestly showed us how the technology worked and made us aware of any implications we needed to consider. We had utmost confidence in their ability."

"It's been a really slick integration. Concise CRM gave us so much attention and their skills are first class. We have a roadmap for future developments and we're looking forward to working with them at every stage in that journey."