

CASE STUDY

O'NEAL STEEL Metal Manufacturing

“ Having worked on various deployment projects within five divisions of O’Neal Steel over the past 25 years, I can honestly say that Fullscope* provided one of the most comprehensive consulting and technical delivery services I’ve experienced to date. ”

David Goff, Sales & Marketing Manager



O'Neal Industries is the largest family owned group of metals service centers in the USA and forms a group of companies that provide product and manufacturing expertise, with strategically located distribution facilities countrywide.

In order to remain profitable and grow revenues in the US steel marketplace, O'Neal needed greater visibility of customers, target accounts, and pipeline information that could be shared across the group. The company needed a common platform for producing detailed, accurate analysis of business development and sales forecasts.

O'Neal Steel required a CRM solution that would bring field-based and internal sales representatives closer together to improve the flow of customer information between them. It aimed to save time on unnecessary sales administration and increase revenue per customer.

The company was using spreadsheets and email systems to store customer information, which meant that methods for producing quotes, sales pipeline reports and maintaining customer engagement records were inconsistent across their 22 district offices. With no central system in place, responses to customer inquiries ultimately resulted in target accounts being poorly nurtured.

Do it once, do it right

O'Neal Steel evaluated a number of CRM consultancies and chose to work with Fullscope. This was based on their portfolio of over 1,000 successful projects, their efficient approach to implementation, and their unique Adopt2Win training methods that empower customers to maximize the impact of CRM in their business.

After discussing overall requirements, Fullscope ran a workshop with internal and external sales representatives and management, gathering input on managing customer information, improving sales processes, making reports easier to produce and developing or nurturing accounts more effectively.

Key Benefits

- Cut customer response times by up to five days
- Increased number of sales calls by 15%
- Increased revenue by up to 6% in the first year
- Saves inside sales reps six hours of admin work per week
- Overall market share up by 2% in the first year of implementation

The need for speed (of information flow)

Sales executives at O'Neal Steel liaised with customers and targeted new prospects, producing weekly paper based customer visit reports. Internal sales representatives and management would then respond to customer inquiries and handle all sales transactions. As the reports were a week old, much time was spent dealing with incoming customer inquiries and chasing external sales representatives for relevant information.

Microsoft Outlook stored customer contact information, so the Outlook front-end plug-in sat on top of Microsoft Dynamics CRM, now Dynamics 365. Dashboards enabled sales executives to monitor and nurture target accounts, share real-time new and existing customer information, prepare sales and pipeline forecasts, and improve sales performance.

90 days promised – 90 days delivered

Fullscope committed to completing the implementation within 90 days so the baseline Dynamics 365 was built virtually for speed of implementation. CRM was then integrated with the Microsoft Outlook plugin and mapped to other essential applications for the preselected test users. This was fine-tuned during the build phase, before the business data was imported and migration took place.

Goff comments: "Fullscope claimed that the CRM would be live within 90 days. They maintained momentum and provided us with weekly progress updates that kept everyone enthusiastic."

In a recent campaign, O'Neal Steel identified 350 prospective leads. This was narrowed down to about 100 marketing-qualified leads and the sales team was able to qualify 95% of these using InsideView. The firm saved 66% of the time it would have taken to chase all 350 leads and used this time to focus on selling.

Sales boost and fine-tuned forecasts

New account views provide updates that are visible immediately, speeding up the sales process and improving the customer experience.

Goff adds: "This is a fantastic increase in just the first year of using CRM. This represents an increase in our overall market share. We are also excited about how CRM will help us in the future. Our power users are already building new workflows and we are planning to create an interactive view to improve the flow of customer information even more."

Streamlined and swifter data flow

With the completion of the implementation of Dynamics 365 O'Neal Steel realized a huge increase in sales productivity and reduced time to value in existing and target accounts.

Internal sales personnel have spent an additional 15% of their time selling product to customers, instead of taking incoming calls that were chasing orders and actions, and they are now making outgoing customer calls in that time. External executives are spending more time with customers and, by sharing information with colleagues more quickly, are much more able to concentrate on nurturing target accounts.

FULLSCOPE SYNCED INSIDEVIEW WITH CRM ENABLING O'NEAL STEEL TO LEVERAGE REAL-TIME CONTACT DATA AND CUSTOMER INSIGHTS. INSIDEVIEW ENRICHES LEAD-GENERATION BY GIVING ACCESS TO MORE THAN 50 MILLION COMPANIES AND PEOPLE, AGGREGATED FROM 30,000 GLOBAL SOURCES.

FULLSCOPE BECAME PART OF THE ALITHYA GROUP IN NOVEMBER OF 2018. Alithya is a leading strategy and digital technology company, with over 2,000 highly skilled professionals delivering solutions across Canada, the US and Europe. Alithya's Microsoft practice covers a wide array of capabilities, including Dynamics, Azure, business analytics, digital solutions, advanced analytics, application development and architecture. Focused on business outcomes, our combined companies have delivered Microsoft solutions to over 1,200 clients. Alithya's global offering is to deliver strategy and digital technology services in addition to implementing ERP and integrated solutions.

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