

## CASE STUDY

# A-DEC Medical Device Manufacturing

“Alithya was not only able to provide us with outstanding customer experience, but they balanced that with driving our CRM implementation to an on time and efficient completion. They are success oriented, attentive, open, and transparent.”

**Taj Tinsley**, Marketing Operations and Program Manager



Headquartered in Newberg, Ore., **A-dec** is recognized among the leading dental

equipment solution providers in the world, with a global network of customers and authorized dealers in more than 100 countries. Founded in 1964, A-dec designs, manufactures, and markets dental chairs, stools, delivery systems, dental lights, and cabinetry. A-dec prides itself on having guiding principles such as concern for people, encouraging public service, and conserving resources, in addition to customer service.

Starting with an initial CRM implementation that was used primarily by marketing to manage leads, A-dec was ready to implement and train CRM for their entire sales team as well.

## Key Benefits

- > Ability to track full lifecycle customer activity and ROI
- > Consolidation of databases into central database
- > Provide effective lead management, resulting in pipeline generation
- > Increase operational efficiency for sales
- > Effective pipeline management for sales
- > Integration with Microsoft products (Power BI, Visualization, Outlook, SharePoint, AX)
- > User friendly CRM that is functional and easy to navigate

While the CRM conversation started within the marketing department, there was recognition that the organization needed a better way to track customers, from lead or top of the funnel activity, down to purchase. As A-dec leads with customer experience, they found that Microsoft Dynamics 365 was the right tool to be able to provide their customers with the outstanding customer experience that the whole company talks about every day. Not only does Dynamics 365 provide value to the marketing team, but also sales, product, and customer service. It even assists in the manufacturing process with the ability to track lead times and helping to plan accordingly.

## Desired Business Outcomes

As much of A-dec's CRM goals revolved around customer experience, there were various business challenges that needed to be met by the implementation of Dynamics 365. In outcomes terms, A-dec needed to provide visibility to their teams and consolidate many of the databases they had. With a great deal of information and lead records coming through their website, email, trade shows, and a variety of different sources, they needed to consolidate them into one central database. Instead of the spreadsheets they were previously using, they are now able to manage all of that information in Dynamics 365.

They also needed to provide effective lead management, and lead handoff, ultimately resulting in pipeline generation. Now, A-dec can more effectively track that pipeline and is beginning to provide statistics on campaign effectiveness to their internal teams. With an additional phase of the implementation that focused on sales, they are also putting the proper pieces in place to help their sales team by increasing operational efficiency within the team and improving their pipeline management.

A-dec is now on their way to tracking their marketing program ROI in order to invest in higher converting programs, rather than programs that are not producing as much pipeline. This, in turn, will provide their sales team with higher quality leads.

## Adoption of CRM

A-dec is dedicated to their people and ensuring their people are well served. With that lens, they wanted to make sure that they were thinking of their people first and foremost in this project. They found that prioritizing training was key to this. Training allowed their people to be better prepared.

While many technology partners will baby you through the whole process without teaching or training along the way, Alithya's trainer approach was a key selling point for A-dec. The Alithya team made sure to walk A-dec through the steps of how to make updates, configurations, etc. within CRM and taught the application admin how to do all of these things. "I can say with confidence that our CRM Admin is extremely confident in his abilities to do pretty much anything to do with CRM that we need at this point, and I attribute that to Alithya's training methodologies. Since we owned the project, we are now able to own our CRM instance," says Tinsley.

## Partnership with Alithya

According to Tinsley, "The team we worked with at Alithya was amazing. Everyone that we interacted with was awesome to work with. We came in with a tight deadline and knew that we were asking for a lot. The whole team banded together and delivered at a level that I could not have expected. I really couldn't have expected more from them. They worked with us on budgeting and were upfront, realistic, and transparent about what we were getting into while answering all of our questions as quickly as I could ever anticipate."

Alithya and A-dec worked together to determine A-dec's long term plan for CRM. Alithya understood the base level needs, and how that could fit into a phase one component of the initiative, while looking at further needs and how they fit into the next phases.

"WHAT REALLY STOOD OUT TO ME WAS THE FORWARD THINKING AND FORWARD PLANNING OF THE ALITHYA TEAM. IN ORDER TO SET US UP FOR SUCCESS AND FUTURE STAGES, THEY REALLY GUIDED US ON HOW WE SHOULD CONFIGURE CRM, HOW WE SHOULD THINK ABOUT CRM, WHO WE SHOULD BRING INTO THE PROCESS, AND HOW WE SHOULD SET OUR GOALS. THEY ALSO BROUGHT IN AN ARCHITECT TO MAKE SURE WE WERE SERVED ON THE TECHNICAL SIDE, AS WELL AS THE CUSTOMER SIDE"

- Taj Tinsley

**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 ERP, CRM, BI and digital solutions to over 1,200 clients. Alithya's global offering is to deliver strategy and digital technology services.

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