

## Customer information from Dynamics CRM available on PDA via CWR Mobile CRM

**S**igma distribution partner, Colours & Coatings, wanted to store all of its customer data centrally and made available to field sales staff via PDAs. The solution: Microsoft Dynamics CRM combined with CWR Mobility's Mobile CRM.

### Colours & Coatings

Colours & Coatings specializes in paints, varnishes and painters' supplies. Among other things, the company is a distribution partner for Sigma Coatings, market leader in varnishes and paints in the Netherlands. Colours & Coatings operates in the east of the Netherlands and has branches in Aalten, Almelo, Arnhem, Enschede and Hengelo. Rolf ter Steege is the field salesforce coordinator responsible for managing the field sales staff..

### Information On Paper

"Some time ago we decided that all data should be stored in one location. This also meant acquiring a good CRM package," explains Rolf ter Steege. "Instead of knowledge being stored in heads, on users' computers and on paper, we wanted all information about our customers to be available centrally. A large part of our business was already automated to a great extent - only our field salesforce were still working in the traditional way with pen and paper. That posed a challenge."

### The Challenge

"Colours & Coatings had previously recognised the benefit of PDAs for field sales staff and management," says Rolf ter Steege. "Our handhelds were synchronised with Outlook. However, the problem with that is that you cannot effectively link appointments etc. to a customer. A CRM system would make that possible. Our field sales staff would then have all relevant information about a customer or prospect to hand. There are various solutions available for this, but most of them are very expensive for an SME like us. We also wanted to retain control of our IT and so the solution had to be easy to use and administer."

### Mobile access to Dynamics CRM

Microsoft Gold partner CWR Mobility has developed a Mobile CRM, designed for all sizes of organisations including for sales and service professionals in SMEs. Mobile CRM makes data from Microsoft Dynamics CRM 3.0 available on any PDA with Pocket PC 2003 or Windows Mobile 5. Colours & Coatings found CWR Mobility on the Internet and arranged an appointment. Rolf ter Steege recounts: "CWR told a good story, but we did want to see it with our eyes first. They then set up a trial version for us and the application really was very easy to use and modify. On the basis of these very positive experiences we opted for Microsoft Dynamics CRM 3.0."

“

"We opted for Microsoft Dynamics CRM 3.0 because CWR Mobility offers a perfect mobile working solution for it."

”


 COLOURS & COATINGS


# Customer information from Dynamics CRM available on PDA via CWR Mobile CRM

## Business Situation

Sigma distribution partner, Colours & Coatings, wanted to store all of its customer data centrally and made available to field sales staff via PDAs.

## Requirements

- Easy to use CRM system
- Good mobile solution for access to CRM
- Low cost software
- No system administrator or long implementation processes needed

## Solution

Microsoft Dynamics CRM combined with CWR Mobility's Mobile CRM

## Benefits

- Mobile CRM has the familiar 'look and feel' of Microsoft Dynamics CRM
- Customer data available everywhere and at all times
- All data in a central location
- Applications can be used without training
- Affordable solution

## Products

- Microsoft Windows Mobile 5
- Microsoft Dynamics CRM 3.0
- CWR Mobile CRM from CWR Mobility

## Related links

- Microsoft Windows Mobile ([www.microsoft.com/netherlands/windowsmobile/default.aspx](http://www.microsoft.com/netherlands/windowsmobile/default.aspx))
- Microsoft Dynamics CRM ([www.microsoft.com/netherlands/dynamics/products/crm/default.aspx](http://www.microsoft.com/netherlands/dynamics/products/crm/default.aspx))
- [www.coloursencoatings.nl](http://www.coloursencoatings.nl)
- [www.cwrmobility.com](http://www.cwrmobility.com)

## Vertical Industries

IT Services

## Country/Region

The Netherlands

## Very Smooth Roll-Out

First Microsoft Dynamics CRM was implemented. As a comparatively small SME Colours & Coatings does not have its own IT system administrator. The Customer Relationship Management package therefore had to be set up by 'inexpert' staff. Rolf ter Steege says: "When you start using Dynamics CRM you don't need to worry that you're getting into a process that is going to take a couple of months. I was able to set up Dynamics CRM myself easily, and add or modify fields where necessary. It is very simple to send information to the field salesforce if you set up the package in the right way."

When the CRM system was up and running, it was CWR Mobility's turn to implement its Mobile CRM. "Here too, there was no long, drawn-out process. Mobile CRM was up and running within a day," says Rolf ter Steege. "CWR made the link with the Dynamics CRM system and I synchronised the PDAs myself, so that our staff now have access to the mobile application."

## Colours & Coatings Don't Want To Give It Up

The combination of Microsoft Dynamics CRM and Mobile CRM offers Colours & Coatings' field salesforce access to selected customer data regardless of where they are. There is no need to fire up a laptop or be somewhere where there is an Internet connection. All that is required is for the PDA to be switched on. The data can be received via a GPRS connection, and the application can be updated if required.

Rolf ter Steege explains the security and the access rights: "Mobile CRM works with user profiles. We have two of those at the moment: one for sales and one for management. Each profile allows the user to do only select things and view certain data. The data sent is limited, and if a PDA should be lost we can delete the data remotely. The customer information is therefore always secure."

The field salesforce is still using the PDA in a relatively simple way. They can view customer data and schedule an appointment, close the activity after the visit and report the outcome of the appointment. Although it is often said that it is tricky to get sales staff to do admin, the field salesforce at Colours & Coatings definitely don't want to give up the device or Microsoft Dynamics CRM.

## More customers, better sales

Microsoft Dynamics CRM and Mobile CRM have now been running for about eighteen months, and work is still being done to expand the possibilities. "We will be using our CRM software to develop campaigns and draw up market lists," says Rolf ter Steege. "What we find particularly important is that the reports are now available centrally and immediately. The system clearly enables us to contact more customers, which naturally leads to better sales. As an organisation which also offers its customers a lot of service and advice, we have quickly realised that we could no longer function without Dynamics CRM and Mobile CRM."

“

Profiles enable role-based use of the PDA: in this way management has different options from the field sales staff, for example. These profiles can also be modified later and are automatically synchronised with the application.



”



Microsoft Business Solutions ISV/Software Solutions



CWR Mobility BV  
Kubboot 16  
3751 ZJ Bunschoten  
The Netherlands

sales@cwrmobility.com  
www.cwrmobility.com  
International: +31 (499) 464 725  
United States: +1 (210) 767 3297