



Microsoft Dynamics Customer Solution Case Study



Snowmobile Manufacturer Improves Customer Service and Staff Productivity

Overview

Country or Region: United States

Industry: Manufacturing

Customer Profile

Polaris designs, engineers, manufactures, and markets snowmobiles, all-terrain vehicles, Victory motorcycles, and the Polaris Ranger for recreational and utility use.

Business Situation

Polaris's support staff had difficulty accessing the information necessary to provide adequate customer service, and management lacked the reporting capabilities needed to assess customer service effectiveness.

Solution

Polaris Industries implemented Microsoft Dynamics™ CRM 3.0 and Microsoft Office SharePoint® Portal Server 2003 with Windows® SharePoint Services for integration of legacy systems and improved communication.

Benefits

- Easy to learn and use
- Customizable to improve productivity
- Enhances the level of customer service
- Improves reporting capabilities

“Microsoft CRM is truly a new platform for Polaris, allowing support and sales teams to evolve and work together in ways that were not possible with the legacy applications.”

Bede Braegelmann, Project Manager for Sales, Service & Marketing, Polaris Industries

Polaris Industries is one of the world's largest manufacturers of all-terrain vehicles and the recognized leader in the snowmobile industry. Various organizations within Polaris used disparate systems, so when customers and dealers called for support, they frequently experienced a bumpy ride. A series of nonintegrated customer relationship management solutions built on legacy technologies made it difficult for the sales and support staff to provide adequate customer service. Management also lacked the reporting capabilities needed to assess the effectiveness of customer service operations. Polaris Industries, in cooperation with Microsoft® Gold Certified Partner Inetium, implemented Microsoft Dynamics™ CRM and Microsoft Office SharePoint® Portal Server. This combination offers employees an easy-to-use system, customers better support, and managers a 360-degree view of operations.



“With just twenty minutes of training, employees know how to use Microsoft Dynamics CRM, including navigation to Polaris legacy applications.”

Neil Quade, Consumer Service and Warranty Supervisor, Polaris Industries

Situation

Polaris Industries, headquartered in Medina, Minnesota, is one of the largest manufacturers of all-terrain vehicles in the world. The company is the recognized leader in the snowmobile industry, and Polaris's Victory motorcycle division, established in 1998, represents the first all-new, American-made motorcycle in nearly 60 years. Within the company, five separate organizations provide support to consumers, internal sales staff, and dealers. With 3,600 employees and more than 1,600 independent dealers, effective communication between these five support groups—and smooth integration between systems—is critical to Polaris's success.

Each of the support teams maintained its own systems, which resulted in a collection of disparate call-logging systems that did not share information. The result was poor communication between groups, ineffective customer service and support, and redundant support efforts that impacted employee productivity. For example, dealers calling with sales questions were tracked in a legacy Web application. Technical questions regarding a Polaris vehicle were tracked in an IBM AS/400 with a traditional green-screen display. While support representatives saw the value of a single, consolidated view of all calls related to a specific dealer or vehicle, none of the disparate systems could deliver this unified view.

Additionally, Polaris management lacked metrics reporting and analysis capabilities to assess the effectiveness of customer service operations and identify specific areas for improvement. Polaris wanted a 360-degree view of all communications and activities with dealers and consumers.

Solution

To address its customer relationship concerns, as well as to enable the various

support organizations to more effectively collaborate and share information, Polaris Industries implemented Microsoft Dynamics™ CRM 3.0 Professional Edition and Microsoft® Office SharePoint® Portal Server 2003 with Windows® SharePoint Services.

Microsoft CRM proved easy for Polaris employees to learn and use. Microsoft CRM integrates with the desktop productivity applications Polaris used, including Microsoft Office Word, Excel®, and Outlook®. Microsoft CRM also integrates with the legacy applications Polaris created to meet its unique requirements. Microsoft Gold Certified Partner Inetium deployed the new systems in a phased rollout that began in October 2006.

Five Support Group Implementations

The Sales Support Group implementation was deployed first because this group tends to handle more straightforward issues, making for an easy deployment with fewer requirements to consider. Additionally, the implementation team anticipated that the transition from the group's Web-based application to Microsoft CRM would be smoother than for groups that relied on mainframe applications.

The second implementation, serving the Technical Support Group for the service department, took place the following month. This deployment required more integration between Microsoft CRM and legacy programs, as well as customization of the forms within Microsoft CRM, such as adding fields for vehicle identification numbers (VINs).

The third implementation is scheduled in 2007 for the Parts Technical Group, which supports dealership parts departments. As with the Technical Support Group, the Parts Technical Group is often called on to address complex issues that require information from numerous sources. The deployment will also

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Bob Vonvett, Technical Service Representative, Polaris Industries

require links to legacy programs and fields for VINs and part numbers. Polaris developers will use processes perfected in the second implementation to ensure a smooth third implementation.

The fourth and fifth implementations, for the Consumer Support Group and the Web Help Group, are also planned for 2007. The Consumer Support Group assists consumers with issues surrounding Polaris products purchased through a dealership. The Web Help Group serves customers who buy products online (at www.purepolaris.com) and helps with general inquiries about local dealers or brochure requests.

Integration with Legacy Programs and Applications

Polaris’s five support groups rely on multiple legacy applications. Each of these legacy applications offers something distinctive to Polaris—such as Order Status, Bill of Materials Schematics, and a Component Parts List. The legacy system integration with Microsoft CRM was imperative.

With Microsoft CRM, it’s easy for support representatives to view dealer issues in a number of different ways, providing quick access to issue-related information and enabling timely resolution. Many of the technical issues Polaris’s Technical Support Group deals with require dealers to provide a photo. In the legacy application, dealers sent photos by e-mail. Photos were stored in Microsoft Office Outlook with no link to the related call—with Microsoft CRM, those photos are attached directly to the case.

Additionally, questions about a specific vehicle can be better addressed by entering the VIN, which activates a number of links that show specific information about that vehicle, for example, service history and other related cases. With Microsoft CRM, Polaris representatives can view the bill-of-materials

structure and a schematic of all the parts that make up a certain component. Field sales representatives enjoy improved visibility into call logs and case information, as well as the attachments, making them better prepared for sales calls and visits to dealerships.

Microsoft CRM also integrates with existing Microsoft applications Polaris uses. When a Microsoft CRM report is exported to Office Excel, managers and associates can click on the case number link in the spreadsheet, and the system automatically opens the full case file in Microsoft CRM. Whether customer information resides in AS/400 files, Oracle Database tables, or Microsoft SQL Server™ tables, users can seamlessly access the information with a single click of the mouse.

Easy Data Migration

Polaris used Scribe Insight software for data integration and conversion. Scribe Insight populates Microsoft CRM with key customer information from Web and legacy applications, making it possible for staff members to work with a complete customer profile. On day one of the initial implementation, all historical records were migrated into Microsoft CRM. According to Bede Braegelmann, Polaris Industries Project Manager for Sales, Service & Marketing, “One hour after implementing Microsoft CRM, a dealer called to discuss an open case. With one click, the support representative accessed the records needed to successfully handle the call.”

Improved Communication and Information-Sharing

Using the collaboration features of Windows SharePoint Services and SharePoint Portal Server 2003, Polaris developers and managers built customized SharePoint sites to serve the needs of technical support, sales, and customer service. Polaris developers easily tailored online forms—based on support issue categories—that

could be completed and submitted from any location for faster, more efficient service. SharePoint sites help Polaris manage content and business processes, simplify how internal and external staff find and share information, and enable more informed decisions among managers.

SharePoint Portal Server helps Polaris improve organizational effectiveness by providing comprehensive content management, accelerating shared business processes, and facilitating information-sharing for better business insight. A single case repository makes it easier to manage data and analyze it in different ways. This helps employees detect problems and identify issues early—and deal with them proactively—thus eliminating future calls on the same issue.

Customized Forms Create Efficiencies

Microsoft CRM is customizable, which allows Polaris to adapt the application to its unique needs without changing the application's base code. For example, the Microsoft CRM entity model offered only one form for incidents. Because each of Polaris's functional groups has different needs, the form was customized to show applicable fields based on the user's functional requirements. For instance, the technical support groups require information such as VINs and model numbers, but customer service groups do not, so customer service representatives do not see these fields.

Additionally, to prevent common errors in data entry, when users enter a VIN or model number in the incident form, Microsoft CRM—through SharePoint Portal Server—automatically validates that information through links to external sites. Polaris developers also customized Microsoft CRM to identify the type of issue based on Polaris's three-tier form organization. For example, if a user selects "warranty" as a first-tier option,

second-tier options are limited to warranty-related issues. Available third-tier options are likewise filtered based on the second-tier selection. Presenting a limited, logical set of options in each form results in more efficient support and service.

Self-Service Extranet Streamlines Support

A dealer self-service site is currently in development and will be deployed in multiple phases to Polaris's existing dealer extranet. Through the extranet, dealers will submit support issues to Polaris staff using customized forms. These forms will also limit available options based on previous selections. The form is completed and submitted online, a support representative answers the query, and the response is posted for the dealer's review.

Microsoft CRM retains completed forms in the "Cases" folder, where Polaris support staff have full access. Open cases assigned to representatives will appear when the representative signs in to the system. When the Polaris support representative responds to the issue, the dealer site will be updated, and the dealer will be able to see the response. Polaris anticipates the dealer self-service site will further streamline customer service operations and ensure faster support. Making self-service forms available online through the extranet will reduce the number of calls to Polaris support staff.

Training and Adoption

Training was a joint effort between Polaris and Inetium. This was the first time Polaris worked with Inetium, awarded Microsoft Central Region Partner of the Year in 2005, who steered Polaris in the right direction to achieve its goals. According to Bede Braegelmann, "Neil Iversen, the on-site Inetium consultant, was extremely knowledgeable and did an excellent job assisting with the implementation and transfer of knowledge to our staff. The

transfer of knowledge was incredibly important to us and crucial to encouraging the staff to support the change in systems.”

All personnel working within the Sales Support and Technical Support groups are effectively using Microsoft CRM. In addition to licenses purchased for the support groups, the Polaris team developed a Microsoft ASP.NET page framework using Web services to provide access to the field sales staff. In 2007, this Web application will be extended to Polaris’s 1,600 independent dealers to connect everyone involved in Polaris sales and service.

The ASP.NET page framework Polaris developed uses secure extranets for field sales, enabling users to view the status of certain cases. This application allows sales staff to identify recent dealer issues and concerns in order to familiarize themselves with open issues and prepare for in-person visits. This same application will be extended so that dealers will be able to see those same issues, or cases, that are outstanding once the dealer self-service site is deployed.

Benefits

The integration across legacy programs and existing Microsoft applications Polaris uses enables employees to provide a higher level of service with less effort, resulting in more efficient customer service. According to Braegelmann, “Microsoft CRM is truly a new platform for Polaris, allowing support and sales teams to evolve and work together in ways that were not possible with the legacy applications.”

The intuitive screens in Microsoft CRM make it easy for users to transition from legacy programs and increase staff productivity by allowing support personnel to spend less time mining data and more time focusing on the needs of the customer. With the added links to internal and external resources,

Polaris quickly accomplished full adoption among employees. Microsoft CRM, coupled with SharePoint Portal Server, improves communication throughout the organization and allows management deeper reporting capabilities to view all communications and activities with dealers and consumers.

Easy to Learn and Use

The links within Microsoft CRM provide one-click access to information in the legacy applications and allow support personnel to easily navigate to the information they need without being constrained by systems that require multiple logons. According to Neil Quade, Consumer Service and Warranty Supervisor, “With just twenty minutes of training, employees know how to use Microsoft Dynamics CRM, including navigation to Polaris legacy applications.”

Customizable to Improve Productivity

Microsoft CRM was customized to filter forms that support staff complete to display only the fields necessary to resolve the issue. With these customizations, employees spend less time populating fields and trying to determine when certain information is required. Additionally, when a VIN or serial number is entered, Microsoft CRM—through SharePoint Portal Server—automatically validates the information through links to external sites, eliminating the need for manual validation by the support representative.

Enhances the Level of Customer Service

Polaris service representatives handle a variety of cases and require quick access to information. Bob Vonvett, Polaris Technical Service Representative, remarks, “With the links provided in Microsoft CRM, I can research a dealer’s issue more quickly and gain greater insight to deliver a higher level of service.”

With Microsoft CRM, support staff can provide better customer service by entering

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For more information about Polaris Industries products and services, call (763) 847-8139 or visit the Web site at: www.polarisindustries.com

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the dealer number to obtain a full view of a dealer's current and past issues. Staff can access existing cases, previous call logs, and e-mail messages while speaking with the dealer or sales representative. The dealer self-service site will empower dealers to obtain support through the channels they prefer and allow support staff and sales to access inquiries from outside the office.

Improves Reporting Capabilities

Management gained a 360-degree view of customer service operations and communications. With the new capability to view data from a variety of different perspectives, managers can discover recurring or widespread issues and adjust operations to resolve those issues. For example, management can analyze trends to identify a bad component part on a line of vehicles and react quickly to minimize costs, improve customer satisfaction, and expedite similar service issues.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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