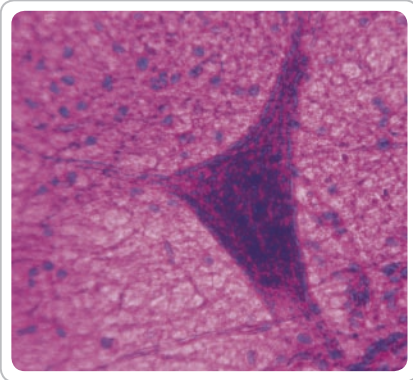




FEI Company

CRM for Microsoft service streamlines quote building process for leading supplier of electron microscopes



FEI Company is the world leader in the manufacture and sale of high-end specialty microscopes for nanotechnology applications.

To efficiently formulate quotes for complex, often made-to-order devices using the company's 10 product lines and specialty tools, FEI engaged EMC Consulting, part of EMC® Global Services, and Microsoft Corporation to help design and deploy a cohesive CRM solution with global accessibility.

“When you talk about rolling out a single CRM solution, which fundamentally shapes the whole selling process on a worldwide basis in one shot, you want the right team of experts on your side,” says Mark Farley, Roll Out IT Director. “EMC consultants and Microsoft provided the technical and functional expertise to support our team and help us succeed.”

Designing an integrated, easy-to-use CRM solution

Previously, FEI's proposal creation and quote approval process was conducted via a complex, non-standardized set of steps that involved at least 15 different applications and spreadsheets. The focus of this CRM engagement was to provide a complete, easy-to-use CRM solution able to tie all sales processes together to build a competitive quote, supported by streamlined approval and proposal-generation processes.

Because FEI's sales force is often on the road, a key requirement of the new CRM solution was that, with the exception of approvals and reporting, virtually anything related to the selling process such as tracking leads, creating quotes, and even creating a proposal based on approved quotes, could be done offline.

“We have a highly specialized sales force and they travel a lot,” says Farley. “Because much of their time is in the field, it is critical that they are able to put together proposals and the other key items that they require to effectively carry out their jobs.”

The project began by engaging FEI stakeholders in a series of design and review exercises guided by EMC and Microsoft technical architects and functional representatives. The goal was to identify and clarify business processes involved, and specifications required, for CRM integration.

Design considerations for the new CRM environment involved the following key areas:

- Integrating core CRM activities such as logging and tracking prospective leads and creating account quotes
- Incorporating a highly complex product set that often requires customization based on client specifications
- Customizing an Experlogix ISV component to support a range of product configuration rules
- Developing and integrating new and existing workflows to address various situations such as securing engineering approval for a particular configuration or incorporating a third-party product
- Establishing a preset approval chain to ensure compliance with business process rules
- Creating a detailed proposal-generation system with a Microsoft Word Mail Merge component to integrate catalog descriptions into the final proposal

Based on the input gathered, a solution was developed and deployed linking Microsoft Dynamics CRM, Experlogix, and Microsoft Word Mail Merge processes with Microsoft Office SharePoint Server 2007 approval processes using Microsoft Windows Workflow Foundation technology.

“With EMC’s help, we accomplished our goal of getting all of our sales processes into a single information system and enabling our users to access it globally. A sign of the usefulness of this CRM solution is the number of people outside of sales who find it helpful. We had originally planned it to be deployed to 120 clients and users. Today, we have more than 320.”

Mark Farley, Roll Out IT Director

“We have a reasonably complex selling process simply due to the nature of the products we build and the industries that we serve,” says Farley. “To simplify that process we needed to have a high degree of integration between all of the applications, workflows, and business processes involved, which is what this CRM engagement with EMC and Microsoft has helped us to achieve.”

End-to-end benefits

Today, FEI’s Microsoft Dynamics-based CRM solution enables sales representatives to perform a range of offline capabilities and then, with Internet access, connect to the SharePoint Server with a single key stroke to initiate an efficient quote approval process. This process is designed to seamlessly route each sales proposal through a predetermined approval chain guided by workflows for different scenarios. Information collected along the approval chain that may impact the quote, such as discount pricing, is automatically updated in the quote.

“We have several workflows that can be triggered from inside of the application,” explains Farley. “A discount approval, for instance, would be part of the sales hierarchy so it would be routed from an account manager all the way up to potentially a general manager or market decision manager, depending on the amount and type of discounting requested for a particular configuration or quote. The intent is to involve all of the necessary people to secure approvals and ensure that we are exploring all options for getting the best deal to the customer.”

The extensibility of the new CRM environment also facilitates easier integration of key processes from across the organization.

“We have a second workflow system created with a different tool that we use for a variety of things, including engineering-related workflows,” says Farley. “It’s now integrated to the same connector that we built to integrate SharePoint. We were pleasantly surprised by how easily and quickly we were able to extend the work that we’ve done on the CRM interface into this second workflow tool.”

In addition, the ability to offer varying levels of access end-to-end, both inside and outside of the CRM environment, enables FEI to easily include groups such as field service and strategic sourcing in the sales process. Granting access to outside agents and distributors is being considered as well.

Allowing non-sales users greater visibility into the sales proposal creation process has made it possible to engage the company as a whole in improving the quality and expediency of proposals presented to customers. This is accomplished by leveraging such advantages as the ability to facilitate faster engineering approvals for a particular configuration; using CRM reports to conduct analysis to improve or develop new workflows; involving suppliers in making a sale by negotiating optimal rates; and coordinating production for more efficient and timely delivery without carrying excess inventory.

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