

RSM! McGladrey

Accounting | Tax | Business Consulting

“Dynamics™ CRM has revolutionized our company by eliminating 80 percent of our manual workload, increasing our efficiency by 99 percent, and reducing the interruptions to production by 40 percent”

Compass Wire Cloth Corporation is an ISO 9001:2000 certified fabricator of wire cloth, maintaining one of the largest and most complete inventories of wire cloth in all meshes, alloys and wire diameters in the industry.

“With the Dynamics CRM system, we have eliminated all the duplication of efforts, streamlined our sales process with improved turn-around, and the CRM system automatically creates the internal document we need to support our internal process and ISO requirements. As a result, we are now more efficient, our sales team is more effective, and our customer satisfaction has increased considerably.”

— Christopher Toppi, General Manager
Compass Wire Cloth Corporation

Compass Wire's CRM system now houses all of their order information and is configured to handle any one of five different types of orders they process. Each order then has at least one job card assigned to it.

All of this information is recorded in CRM by the front-office staff and through automation services, producing the order and its corresponding job cards (the paperwork) directly to the staff in the Fulfillment Center. These printouts were customized to the needs of Compass Wire, calling programming logic and formulas to provide them a visually simple job card.

Because orders and job cards are stored in CRM, the administrative staff can efficiently print reports related to Production and Shipping departments and search for orders in a quick and well-organized manner.

Background

Compass Wire was manually processing their sales orders. At that time, the process would take them two to three days per order to deliver to the warehouse for production. The process included: handwriting of the original order from the customer, entering the order into a log, recording the order in Microsoft Dynamics SL Accounting System, re-writing the order onto a job card, and finally, someone hand delivering these orders to the production department.

Project

RSM McGladrey implemented the Microsoft Dynamic™ CRM Business Solution.

Outcomes

- Solutions eliminated re-entry of job ticket for production
- Orders were filled faster and with less manually work, reflecting a 40% reduction in interruptions
- 80% of the manual paperwork has been eliminated
- Internal documentation is automatically created to support ISO requirements