

Microsoft Dynamics CRM

Farm credit provider reaps results with Microsoft Dynamics CRM

While plenty has changed in farming over the past few decades, one thing has not changed—business built on long-term relationships. The United Farm Credit Services (United FCS) team recognized that an enhanced customer relationship management (CRM) system could help them maintain and build upon that commitment to long-term relationships, as they drive toward increased market share.

“There aren’t too many businesses like ours, where customer relationships go back two or three generations,” said Pete Smith, Vice President of Sales, at the member-owned cooperative which sells credit products and services in Wisconsin and Minnesota. “Our sales process can take several years, and it often hinges on little things like remembering a farmer’s kids by name.”

On the other hand, small-town friendliness isn’t enough to win the business of today’s sophisticated agricultural producers. A wealth of offerings from banks, suppliers and online lenders give farmers many more financial service options than they had 90 years ago, when United FCS was founded as a farmer co-op in south central Minnesota. Today, the organization has grown to include six Minnesota locations, along with a recent expansion to six additional branches in central Wisconsin. The combination of increasing competition and their own aggressive expansion created a need for world-class customer relationship management, a capability beyond the reach of the Goldmine software United FCS had been using for managing prospects.

Integration made easy

A key challenge was replacing Goldmine with a robust solution that would work for dozens of financial service officers, customer service representatives and support staff in multiple locations. United FCS sought advice from their colleagues at Farm Credit Services of Illinois, who suggested calling TopLine Results Corporation. “The people in Illinois implemented their own CRM solution with TopLine (Results), and they were impressed with the result,” recalled Roger Koster, Chief Information Officer for United FCS. “That gave us a very important comfort level.”

TopLine Results consultants worked with the United Farm Credit Services management team to determine the best possible CRM solution. United FCS’s highest priorities included:

- Affordability — keep the project within their budget
- Microsoft compatibility — integrate with their existing, enterprise-wide Outlook deployment
- Interface flexibility — adapt to the screen conventions of the company’s existing CRM package



Customer

United Farm Credit Services

Industry

Agricultural Financial Services

Location

Willmar, Minnesota

Number of users

74

Product

Microsoft Dynamics CRM

Scenario

Agricultural financial services firm seeks to strengthen client relationships and organize customer service teams

Solution

Microsoft Dynamics CRM implemented by TopLine Results Corporation

Outcome

Centralized data access, more reliable information, improved communication between home office and field representatives

- Seamless offline capability — easily update laptop data using Microsoft Dynamic CRM's offline folder synchronization as customer contact occurs in the field

After presenting a range of solutions TopLine Results recommended Microsoft Dynamics CRM, which met with enthusiastic agreement. "We're a Microsoft shop," said Roger Koster, "and we didn't need to teach anybody Outlook. That would make rolling out the system a lot easier."

The project

Once United Farm Credit Services selected Microsoft Dynamics CRM, TopLine Results commenced the project with a needs analysis to determine the specific steps required to make this implementation a success.

TopLine Results developers delivered a Microsoft Dynamics CRM system that easily conveys all of United FCS's existing data and makes it accessible through the Outlook calendar. "There wasn't a lot of hands-on effort needed from our end," said Mr. Koster. "When you're wearing a number of hats like I do, less effort is definitely a good thing."

TopLine Results developed a training program to bring hundreds of United FCS employees quickly up to speed. "We knew we'd need someone to help us through that process," Pete Smith stated. "I did a lot of the training on the legacy CRM package, and we wanted this implementation to go smoother and take up less of our time." TopLine Results facilitated the training with a series of web-based training sessions, reinforced by personal train-the-trainer events for both corporate managers and United FCS computer system administrators. "The beauty of the webinar is that it's more than a one-time training event," said Mr. Smith. "We were trained on the system to build a confidence level, then we had the added

confidence of the webinars to train our staff." "The training was excellent," added Mr. Koster, "yet they accomplished it all without the cost of coming here to train everyone in person. That's a testament to their thoroughness, in my opinion."

System bears fruit

Today the United FCS Microsoft Dynamics CRM system is running smoothly with improved call reports, sharpened sales tracking and a clearer picture of account activity across the organization's ten product lines. "It has really improved our sales forecasting. What used to require combining six Excel files can now be done in a single report from CRM," Pete Smith stated. "We are more aware of what our sales staff is doing. If one of our financial service officers isn't as successful as they want to be, we can pinpoint why and apply the right type of sales training to remedy the problem."

"From an IT perspective we went through an initial period of high support calls," added Roger Koster, "but now this technology is very much running itself."

With the successful Microsoft Dynamics CRM implementation at United Farm Credit Services offices in

Minnesota, the company now plans to roll out the platform to six Wisconsin offices currently without a formal CRM system. "For us to be up and running and ready to implement Phase II of our growth this quickly is tremendous," Mr. Koster said.

The United FCS management team feels confident that the relationship with TopLine Results will be a lasting one. "We appreciate the comfort level we have with TopLine," said Mr. Koster. "Put that together with an ability to produce results, and you have a pretty attractive combination."

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Roger Koster, Chief Information Officer

TopLine Results Corporation

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ABOUT TOPLINE RESULTS CORPORATION

TopLine Results Corporation is a customer relationship management (CRM) consulting firm specializing in Microsoft Dynamics CRM, Act! and Saleslogix. Services include cloud-based CRM via hosted solutions, system design and implementation, and training. TopLine Results also develops custom applications which integrate with Act! and CRM. Headquartered in Wisconsin, with offices in Chicago and St. Louis, our mission is to empower companies with customized CRM solutions which increase effectiveness in sales, marketing, customer service and overall business performance.

