



Client Success ULTRAFLEX

ULTRAFLEX SAVES 500 HOURS ANNUALLY WITH HELP FROM THEIR MSP, NET AT WORK AND MICROSOFT DYNAMICS 365 CRM



CHALLENGE

Ultraflex needed a CRM system that was simple and intuitive to use, yet powerful enough to provide automated marketing workflows and customer support functionality.

SOLUTION

The company partnered with their MSP and Net at Work to deploy Microsoft Dynamics 365 CRM, including add-on solutions for marketing automation and integration with Sage 100.

IMPACT

- Automated workflows save 500 staff hours every year
- New insight into sales funnel allows Ultraflex to hone sales strategies and convert more leads
- Metrics surrounding prospects allow company to segment its database and target marketing communication
- Web form integration with Dynamics 365 CRM and Sage 100 eliminate manual steps and duplicate data entry

Ultraflex Systems Incorporated creates flexible, durable, and show-stopping soft signage, building wraps, banners, floor and wall coverings, and graphics used by retailers and brands around the world. Sold through a network of resellers, Ultraflex is a master marketer, generating demand for its unique creations and routing the leads to its dealers. The company backs its products with outstanding service and support. To keep the presses humming, resellers empowered, and customers buying, Ultraflex relies on Microsoft Dynamics 365 CRM and Net at Work.

THE RIGHT TEAM AND CRM FOR THE JOB

“We have used two other CRM applications over the years,” recalls Kylie Schleicher, Product Manager for Ultraflex. “Like many companies, we struggled to get everyone to use the system, and ended up using it for simple contract tracking and not much more. If you just want to consolidate all your email communications, that’s fine — but we wanted more from CRM. Marketing and lead generation is our lifeblood, and we need powerful automation tools to keep business flowing.”

Ultraflex turned to their outsourced IT / MSP partner, Solutions Strategies, Inc.*, for guidance who brought in Net at Work as their Line of Business subject matter experts.

Net at Work evaluated multiple applications, including Sage CRM and Salesforce, before recommending Microsoft Dynamics 365 CRM. “Net at Work assured us they could integrate Dynamics 365 CRM with Sage 100, which was very important to us,” says Schleicher. “In addition, Dynamics 365 CRM has an intuitive interface that’s familiar to Microsoft users. That shortened the learning curve and boosted user adoption rates right from the start.”

MEASURING MARKETING IMPACT

Ultraflex invests heavily in its online marketing campaigns, and Microsoft Dynamics 365 CRM is helping the company optimize the results of those campaigns through tailored messaging to targeted segments. “We’re tracking information in Dynamics 365 CRM, like which printers our customers use, and then create campaigns speaking specifically to them,” says Schleicher. “It’s super



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easy to do and much more effective at raising conversion rates than blasting emails to everyone in our database.”

Net at Work incorporated ClickDimensions, a marketing automation solution, into Ultraflex’s implementation. It allows the company to capture web analytics from its website, providing deep insight into the pages visitors linger on and the links they click.

Smart web forms created by Net at Work gather prospect details which feed into Microsoft Dynamics 365 CRM for segmentation and dealer assignment. “Depending on the prospect’s interests and location, the lead automatically routes to one of our distributors for follow-up,” explains Schleicher. “And with the analytics we’re collecting, we can hone our messaging to better reach prospects.”

AUTOMATION SAVES 500 HOURS ANNUALLY

One of the web forms Net at Work designed is a sample order form to speed and automate getting product samples into prospects’ hands. As

soon as a prospect completes the web form, a seven-step automated workflow kicks off. First, a sample order is created in Sage 100, followed by customer communications, dealer assignment, and ultimately — the creation of a new sales opportunity. “Net at Work helped us automate five out of the seven steps in that workflow,” says Schleicher. “We estimate that automation saves us 500 staff hours every year.”

Because Ultraflex sells through distributors, it was always difficult for the company to directly correlate its marketing activity with sales. Now, the company has gained insight it never had before. “Previously, we didn’t know what opportunities our sales staff was working on until we got an order,” Schleicher says. “Now we can see the pipeline — the value of each opportunity, the products proposed, any competitors for the deal, and ultimately why we won or why we lost. This insight has made us more effective marketers.”

SUPPORTING INSIGHTS

Ultraflex provides tier one support directly to its customers, and

Net at Work helped streamline and automate this process. A custom web form allows customers to initiate a service ticket or request a return. What was previously an entirely manual process is now nearly fully automated. The workflow captures data entered on the web form and populates both Microsoft Dynamics 365 CRM and Sage 100, eliminating the need for duplicate data entry and ensuring that the company’s sales team has visibility into the support tickets.

“Before, this information was completely segregated,” says Schleicher. “Our sales staff doesn’t have access to Sage 100, so this gives them the information they need to offer better service and support.”

UNLEASHING THE POWER

“Net at Work helped us create a marketing machine, unleashing the power by automating manual processes and providing visibility and insight we use to convert more leads into sales,” concludes Schleicher. “We continually benefit from their technical expertise and collaborative approach.”

Net at Work — Business Performance Unleashed.

Our proven methodology and diverse application expertise help MSPs deliver on the promise of being a trusted advisor to their clients. Once enrolled in our Partner Alliance Program, our tools and subject matter experts support the MSP as they work with their clients to build and execute strategic roadmaps to align Information Systems with Business Objectives. The MSP’s ability to expand their role as a trusted advisor results in stickier clients, more opportunities and new recurring revenue streams. By joining the MSP Alliance program, Net at Work will become your master reseller for leading business applications including ERP, CRM, Employer Solutions, eCommerce Payments, and Cloud.

*Note: Solutions Strategies, Inc. has since been acquired