

# DMC Case Study:

## OptimumFX



Business Growth Solutions



**OptimumFX supplies leading edge software solutions that help FMCG organisations improve manufacturing productivity and OEE whilst reducing costs. They also work with clients to create and implement plans to achieve long term sustainable improvement.**

Company:

**Summary:**

**OptimumFX**

Microsoft Dynamics CRM has enabled OptimumFX to:

Region:

- Deliver excellent customer service and effectively manage the lifecycle of a relationship
- Provide real time data to allow sales teams to handle enquiries more effectively
- Easily integrate the solution with existing Microsoft programmes like Exchange and Outlook
- Implement a scalable CRM solution that will grow alongside the business

**Birmingham**

Number of Seats:

**5**

**Situation:**

Product:

Established in 2001, Birmingham-based OptimumFX is a company that's successfully evolving with the times. Adrian Pask explains how over the past year there's been a marked shift from supplying "five figure" software to a niche "mainly director level audience" to offering less expensive products to a much larger customer base.

**Microsoft  
Dynamics CRM**

Before, the success of a sale was largely dependent on the "depth of the relationship with the customer" rather than the volume of leads generated. "Our previous CRM solution coped with this reasonably well, but as our focus changed, we quickly realised it wouldn't be able to keep pace."

So the hunt was on to find something "more robust" and that would enable OptimumFX to track their growing contact database and reduce the length of sales cycles. "In short, something that would fully support our sales function and enable our new sales guy to achieve his targets - before, during and after each sale."

Adrian had a specific shopping list. "As a technical company, we host our own email

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Company: handle a lot of other technical functions in-house. So we needed something that would integrate seamlessly - and Microsoft Dynamics CRM ticked all the boxes.

### **OptimumFX**

Region:

“Unlike our previous CRM solution which had functionalities that separated it from Microsoft Exchange, Dynamics is a Microsoft product. It’s fully integrated into both Exchange and Outlook so just from that perspective alone it made sense.”

### **Birmingham**

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Initially Adrian approached four different Microsoft Dynamics resellers. “But I was particularly impressed with David Curtis and his team from DMC. I found him extremely honest and open. I also got a strong sense that he wanted me to achieve my goals rather than just flogging me a system or directing me down a particular road.

Product:

### **Microsoft Dynamics CRM**

“DMC provided us with an ‘Action Pack’, a five user version of Dynamics which you can buy fairly cheaply to get a feel for the real thing. This has been running about two months now and our sales guy has been using it more or less constantly. We plan to roll out the full solution shortly, tailoring it to our needs as we go along, bringing in DMC as and when we need them.”

### **Benefits:**

Compared to the old CRM solution Adrian says that Microsoft Dynamics is “a breath of fresh air, even on the basic configurations”.

He has been impressed with DMC, too. “They’ve been very free with advice. They’ve provided technical support, set up the installation and answered all our questions. That then led to the Action Pack ‘pilot’ which they helped set up for us.

“We also called them in for a day of training which was excellent. Their guy really seemed to understand our business and what we want to achieve. He then worked with us in an informal way to make sure we met our objectives. It was a really first rate training session.”

In conclusion? “The biggest advantage to us as a business is, without question, Dynamics’ work flow function. You just input a customer’s details and it schedules a whole series of telephone calls and appointments on whatever timescale we set up.

“For us, that’s a massive benefit. In the past when dealing with a small number of high spending customers, we could afford to rely on memory when it came to following up sales. But this is impossible with the new, larger customer base.

“The key with Microsoft Dynamics CRM is that it enables us to deliver exceptional levels of customer service, even when dealing with high volumes of customers. By scheduling phone calls, appointments and follow up it means we always keep our promises and never miss an opportunity.

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Company:	“Already we’re getting excellent feedback from new customers on the level of support they’re getting. They genuinely feel we care about them. We simply couldn’t have carried out CRM at this level with the old solution.”
<b>OptimumFX</b>	
Region:	So how does Adrian see his relationship with DMC in the future? “We’ll most definitely be bringing them in as we grow. We’ve been extremely impressed with DMC and what they’ve been able to do for us.”
<b>Birmingham</b>	
Number of Seats:	In summary, Microsoft Dynamics CRM has enabled OptimumFX to:
<b>5</b>	<ul style="list-style-type: none"><li>• Deliver excellent customer service and effectively manage the lifecycle of a relationship</li></ul>
Product:	<ul style="list-style-type: none"><li>• Provide real time data to allow sales teams to handle enquiries more effectively</li><li>• Easily integrate the solution with existing Microsoft programmes like Exchange and Outlook</li><li>• Implement a scalable CRM solution that will grow alongside the business</li></ul>
<b>Microsoft Dynamics CRM</b>	