Looking after your customers is a crucial element for the success of any business, whether that relates to simple customer care or moves to enhance the ‘customer experience’. Every contact customers have with your business is an opportunity to improve your reputation and increase the likelihood of repeat business from them. From your telephone manner, to the first contact in the show room and the efficiency of your workshop systems, almost every aspect of your business affects customers’ perception of your organisation.

These ‘moments of truth’ can have a considerable impact on sales – both in terms of the initial sale and, perhaps more importantly, the sales that can be gained over the lifetime of your relationship with each of your customers.

How much could this be worth to your business in terms of the recommendations that they might make to family, friends and work colleagues?

Statistics tell us that it is up to six times cheaper to keep an existing customer and encourage them to spend more, than it is to attract a new customer – worth remembering when your marketing budget is squeezed.

Surveys have found that a satisfied customer will tell approximately 5 other people about their positive experience. Unfortunately, each dissatisfied customer will share their experience with at least 9-15 other people and some (around 13%) manage to tell 20 or more people! This means that your marketing team needs to find 12 new satisfied customers for every dissatisfied customer, just to maintain the status quo. Source: "Understanding Customers" by Ruby Newell-Legner

The DMS that you use to run your business should provide functionality that fully supports your team in working with prospects (and turning them into customers) and then maximizing the opportunities to look after your customers and sell more to them.

Enabling your sales people to work directly with their prospects on the showroom floor – rather than being ‘tied’ to a desk – is one way to improve the customer experience.

Through the use of tablet ‘apps’ your sales people will be able to discuss vehicle configuration and build a quote for the customer whilst sitting in the car that they are interested in buying. The quote can then be emailed directly to the prospect – without having to return to their computer.

The sales advisor tablet ‘app’ is included as standard with Annata Dynamics DMS.
Your DMS should be working just as hard as the employees in your business.

Successful businesses put processes and systems in place with the aim for their people to spend as little time as possible carrying out administrative tasks and more time in ‘customer facing’ roles such as being on the sales floor looking after the needs of prospects and customers.

With many Dealer Management Solutions the functionality does not cover all of the needs of a business. This may mean that there is the need for re-keying of information into / from separate CRM / finance / showroom solutions. This leads to the potential for mistakes as well as tying up people ‘back of house’. The other alternative is for interfaces to be built which could prove to be expensive to maintain, especially if they have to be re-written during upgrades to any one of the solutions.

This white paper discusses how dealer groups can benefit from a market leading DMS built inside a world class ERP system. In effect this means that an organization can manage their entire business: HR; Sales & marketing; Purchases; General ledger; Banking; Fixed Assets; etc. as well as all aspects of the dealership – using a single software solution.

This doesn’t mean that your business is destined to ‘stand still’ from a systems point of view. Hundreds of thousands of hours are ‘spent’ on R&D every year to update the functionality to match the current and future business needs. This means that your business can learn from the ‘best practice’ of organizations from around the world – helping you to strive for continual improvement, stay ahead of the competition and delight your customers every day.

This is your introduction to Annata Dynamics DMS for Microsoft Dynamics AX2012.

AGRICULTURAL EQUIPMENT DEALER GROUP IN AUSTRALASIA

THIS ORGANISATION UTILISES THE POWERFUL COMBINATION OF DYNAMICS DMS AND MICROSOFT DYNAMICS AX TO DRIVE CUSTOMER SERVICE IN THE VERY COMPETITIVE AGRICULTURAL MARKETPLACE IN BOTH AUSTRALIA AND NEW ZEALAND

A ‘customer driven’ organization is one that thinks in terms of the customer and uses customer information to determine the value that you have from them and what additional value can be gained. ‘Customer driven’ does not necessarily mean offering big incentives or rewards. You should not assume that all of customers want to be treated in the same way. Adding the personal touch, which might only be a small gesture, will show to your customer that you genuinely care about them, keeping them loyal to you (and away from your competitors).

Your ERP system should be flexible enough to support your team in providing the personal touches that will help to set your business apart from the competition. The system should be easy and intuitive to use so that it does not dictate, or interfere with, the transaction with your customer.

What information do you have about your customers?

Information about your customers and what they want is available from many different sources, including:

- The history of their transactions
- Records of their communication with your business – phone calls, meetings etc.
- Direct feedback – if you ask your customers will usually tell you what they want
- Changes to patterns of transactions – have they stopped having their car serviced by you?
- Changes in the overall success of specific products or services
- Feedback about your existing product and service range – what it does and doesn’t do
- Enquiries about possible new products or services
- Feedback from your customers about things they buy from other businesses
- Changes in goods and services that your competitors are selling
- Feedback and referrals from other, non-competitive suppliers
All of this, and more, is easily accessible and usable within Annata Dynamics DMS. Information is accessible directly from the customer record, from individual sales orders or from details that are held in the Sales Management module (which includes many of, if not all of the really useful, features found in a full blown CRM system) that is built inside the solution.

The Sales Management module can be used to proactively support your people in converting leads into prospects and then into customers. Quotations can be raised for prospects and customers and the information entered can be used when a sales order is subsequently created. There is no need to re-type information or to maintain multiple systems. The system also allows you to view all transactions relating to your customers and supports ongoing contact with them to promote improved service and future sales.

The Sales Management module also enables you to archive any information that you wish to keep relating to your prospects or customers. This information can be in the form of Word documents, emails or even photographs (for example, to support a claim that they are making).

**How well is your business performing?**

Remember the old adage that ‘what gets measured gets done’. The highest performing businesses put systems in place to assess performance in those areas which significantly affect customer satisfaction levels. Identify Key Performance Indicators (KPI’s) which reflect how well you are responding to your customers’ expectations.

For instance, you might track:

- Sales renewal rates
- The number of queries or complaints that you receive about your products or services
- The number of complaints about your employees
- The number of damaged or faulty goods returned
- Average order fulfilment times
- The number of contacts with a customer each month
- The volume of marketing material sent out and the responses generated
- Time taken from order to delivery

Wouldn’t it be great if real time information was available to your people so that they can track how well they are performing in these key areas. Wouldn’t it be great if the DMS could be set up so that your employees are prompted to act on the tasks that they need to focus on?

There are also important areas of customer service which are more difficult to measure. Many of these are human factors such as a receptionist’s telephone manner or a salesperson’s conduct when dealing with clients. In these areas, it is crucial that you get feedback from your customers about their perception of your customer service.

Customer surveys, feedback programmes and occasional phone calls to key customers can be useful ways of estimating how customer service levels in your business are perceived.

Built into Annata Dynamics DMS is a module that will fully support your aim to get greater levels of feedback from your customers. The questionnaire module enables you to create questions that you wish to ask your customers, prospects and suppliers. These can be combined into questionnaires that can be used to collect this important information. The data can then be collated, analysed and used to re-shape the ways in which you do business with all external contacts.
One example might be to ask your customer to complete a questionnaire when they come to pick up their car after it has been serviced. A tablet computer could be handed to the customer with a simple questionnaire that includes a few questions to get their immediate feedback. This ‘short’ questionnaire could then be followed up a week later by emailing them a longer questionnaire that goes into more detail about their service experience.

**Communicating with your customers**

Another key element in offering excellent customer care revolves around ensuring that you communicate with your customers when the need arises. Remember that this may be an effective response when a customer contacts you as well as when you contact a customer. This may be to inform them of the status of an item that they have ordered from you (although they could check this themselves through the built in portal functionality if they have access via the web) or it may be to inform them that the service has been completed and their vehicle is ready for collection. Different customers will have a preferred method for communication, whether that is telephone, email or text and your system should be flexible enough to communicate with the customer using their preferred method. With Annata Dynamics DMS, this process can be automated by linking the status of the order (or service) to the message being sent. This means that your customer gets the service that they want without your business having expended any additional effort.
Every business has to deal with situations in which things go wrong from a customer’s point of view. How you handle these situations is crucial to the overall success of your organisation. However you respond, don’t be dismissive of your customer’s problem – even if you are convinced you are not at fault. Although it might seem contradictory, a customer with a complaint represents a genuine opportunity for your business:

- If you handle the complaint successfully, your customer is likely to prove more loyal than if nothing had gone wrong
- People willing to complain are rare – your complaining customer may be alerting you to a problem experienced by many others who silently took their custom elsewhere

It is possible to manage the customer complaints process through the ‘Service case’ functionality built into Annata Dynamics DMS. A service case can be initiated from a vehicle (perhaps if the complaint relates to a new purchase), a workshop case (if the complaint relates to work that has been carried out on the customer’s car) or directly from the customer if it is a general complaint.

It is crucial that the complaint is handled quickly and effectively, which means acknowledging the customer and then directing it to the person who can carry out an investigation and provide an explanation to the customer. Within the Dynamics DMS solution it is possible to manage these stages of the process. It is also possible to ‘chase’ the person handling the complaint if they have not responded within 5 days (or any response timescale that is your company standard). The response ‘alerts’ are designed to appear on the dashboard home page of the relevant person or can be set up to appear as activities within Microsoft Outlook.

Details of communications with your customer are automatically kept so that it can be referred to in the future, should the need arise. The reporting system embedded within Annata Dynamics DMS can then be used for further analysis so that trends (around type of complaint or speed of response, for example) can be identified and can be used to highlight issues that may have caused the complaints in the first place.

Obviously, complaints could be used as one of the KPI reporting areas available on the dashboard. This would mean that accurate information is always available, both for the user and their supervisor.

**Additional functionality to help deliver great customer service**

- Manage customer loyalty schemes through ‘trade agreements’
- Manage promotional offers and track ‘trade in’ directly inside the system
- Manage alternative and supplementary items
- Alert customers directly from the system at key stages of the sales order / delivery process

All of this information helps to give the company a ‘360° view’ of the customer, truly ‘knowing’ your customer. This makes it easier for a company to proactively contact them regarding promotions, special offers or extra services that are being introduced. Simple contact points, such as on the anniversary of them buying the vehicle are also easy to setup as an automated process. In a broader sense, it also makes it easier to make predictions on market directions or the future needs of customers, which could lead to the introduction of new products and services. Persuading the customer to come back to you rather than the competition, is the ultimate aim for the business and this is where understanding the lifetime value of a customer fits in.
About Annata

Annata is an international management consulting and technology services company. With the combination of deep industry experience and comprehensive capabilities within chosen technology areas, Annata works closely with customers and partners around the world to help them become high-performance businesses.

Annata’s strategy builds on our expertise in consulting and technology. Adding that to our industry knowledge and the industry specific solutions offering, we help business around the world to undertake high-impact business improvement projects.

Through industry focus and relentless determination to deliver world class technology solutions we have gained trusted status with many of the world’s best known companies. Locally we have earned the trust of businesses of all sizes in many industries. Annata enjoys strategic partnerships with local, regional and global partners who have embraced our technology solutions and created new business opportunities, earning them a preferred status on their own.

Some of the strengths that define Annata and distinguish us from our competitors are:

- Our robust and tested partner organization, including the partner training services, certifications and support model
- Our ‘Certified for Microsoft Dynamics’ and ‘Tested for Microsoft Dynamics’ technology solutions
- Our extensive industry expertise
- Our customer focused service model
- Our business technology innovation and effective deployment of business technology advancements to the marketplace
- Our long-term commitment to the development of our employees

Annata works with many of the better known brands in the equipment and automotive sectors – either directly through our own operations or indirectly through our worldwide partner network. It may be that a customer in Brazil or another in Sweden are doing something in their business that could be beneficial to your business at some time in the future (whether that is next year or in 5 years’ time) – this is what we mean by ‘sharing best practice’ between organizations around the world. This is the sort of thing that you could miss out on if the decision is made to build an ‘in house’ solution.

Microsoft Dynamics AX & Annata Dynamics IDMS - Functional map

Find out more

If you want to find out more about Dynamics DMS for Microsoft Dynamics AX2012 please visit our website [www.annata.co.uk](http://www.annata.co.uk).

We would also be happy to help with any specific questions that you may have relating to Annata or our solutions. Please feel free to contact us on [info@annata.co.uk](mailto:info@annata.co.uk).

We look forward to hearing from you.