

Madix Uses Dynamics 365 Customer Engagement to Unify Sales, Service, Marketing, and More

Madix has over 50 years of experience in solving retailers' merchandising and design challenges. A leader in the store fixtures industry, Madix works with brands and retailers across the U.S. to manufacture and provide shelving, lighting, and displays. Known for its excellent customer service, Madix prides itself on maintaining long-term relationships with customers. And with customers spanning nearly every retail segment from big-box stores to specialty retailers to convenience stores, consumers encounter Madix's work daily.

After years of using a mix of outdated and legacy systems, Madix embarked on a search for a new CRM solution to help improve the company's operational efficiencies, service levels, and sales performance. Madix' sales and marketing teams had no digital sales and marketing backbone. Leads and opportunities were tracked in Excel, and there were several instances of duplicate data entry among the Marketing, Sales, and Customer Service departments. Madix team members were relying on emails, Excel spreadsheets, and outdated Access databases to track customer requests, resulting in bottlenecks and communications issues. Without clear workflows and visibility into the entire system, users were unsure of their next actions, who was doing what, and the status of sales, marketing, and customer service activities.

Madix chose the Dynamics 365 Customer Engagement suite of applications as its new CRM platform and implemented Dynamics 365 Sales, Customer Service, Marketing, and Customer Voice. Working with Sunrise Technologies as its implementation partner, the project involved 22 system integrations, 8 system replacements, and 4 new system deployments over 8 months. Sunrise also deployed a Power Apps Portal for customers to access their account information, track shipments, and download important documents. Although the scope of the project originally only involved the sales, customer service, and marketing departments, the capabilities in Dynamics 365 gave Madix the ability to automate and streamline processes throughout the company. Today, eight of Madix' departments use Dynamics 365 to automate workflows and track customer cases, with each department seeing improved operations.

About

A leader in the store fixtures industry, Madix designs, develops, and distributes innovative displays and shelving for retailers.

Industry

Discrete Manufacturing

Solutions

Dynamics 365 Sales
Dynamics 365 Customer Service
Dynamics 365 Customer Voice
Dynamics 365 Marketing

Project Outcomes

8 system replacements
4 system deployments
22 system integrations
...in 8 months



SALES

When Madix was contemplating buying a new CRM, the sales team was top of mind for who would benefit from using the solution. Prior to implementing Dynamics 365 the sales team members relied on phone calls and emails to get status updates on orders, quality control, and answers to customers' questions. Now Madix' sales team members can login to one system and see status updates for open customer cases. Dynamics 365 Sales works seamlessly with other Customer Engagement apps to provide a single platform and source of truth for open customer cases. Rather than relying on email and phone calls, custom workflows send alerts to the right people at the right time as opportunities and cases are updated. The Madix sales team even uses Dynamics 365 beyond customer relations: team members can track and submit forecasts, request new products, report field quality issues, and set up new customers. Cesar Guerra, Madix' Director of Sales, asserts that, "[Microsoft Dynamics] has given our sales team a process they can use to collaborate, capture information, and communicate better internally and with our customer partners."

CUSTOMER SERVICE

Madix works with its customers to design, manufacture, ship, and install store fixtures. For Madix' customers, these are large projects that require regular communication and visibility into the project's status. The customer service team used to rely on email to track customer service issues, resulting in bottlenecks and confusion amongst the team over who was handling what. The Dynamics 365 project offered the Madix customer service team an opportunity to completely redesign their processes for troubleshooting customer issues, in a way that made sense for them – without being hampered by the limits of their legacy systems. Scott McKenzie, Director of Customer Service, says, "The data organized and presented by our CRM platform gives us a better understanding of our customers, which helps offer better, more efficient customer service. Furthermore, our customer service and sales teams can collaborate more easily, streamline our processes, and reduce silos." Today, Madix is using Dynamics 365 Customer Service and Power Apps portals to facilitate better customer communication and provide insight into project statuses.

POWER PLATFORM PORTAL

Sunrise replaced an old SAP customer service portal called MyMadix with a Power App Customer Portal. Built using Power Apps Portals, it enhances the customer experience and provides a wealth of information. With the new customer service portal, customers can:

- Look up order history
- See shipping and delivery status
- Look up invoices
- Submit customer service support tickets

Access knowledgebase articles for detailed product information

See enhanced order tracking with integration to SensiWatch, including access to photos of truckload and LTL shipments. With the new customer service portal, "our customers are getting the service they deserve day or night" says Marcy Stephens, Madix' Customer Service Manager.



MARKETING

Madix' marketing team maintained tens of thousands of customer records, with no easy way to share that data with other departments. Prior to implementing Dynamics, sharing marketing data was a highly manual process wherein team members would create and email spreadsheets to those who needed it. After deploying Dynamics 365 Marketing, members of sales, customer service, and marketing can see and edit records in real time. "I am happy that the marketing data can finally be properly utilized by the people who need it," says John Clontz, Director of Marketing. "I feel like sales and customer service now own the data instead of it being just marketing's."

ACCOUNTING

Before implementing Dynamics 365, Madix' customer information was siloed in several different legacy systems. The company's credit and accounting team members often faced the problem of inputting duplicate information, while missing information or customer history notes added time to case resolution. As a B2B business, Madix relies on maintaining positive relationships with its customers to strengthen and grow the business. But now, with Dynamics 365 Sales and DocuSign, "CRM has allowed credit and accounting to simplify receivable issues as well as allow customers to 'go green' throughout the on-boarding process by eliminating the redundancy of signing required paperwork," says Kim Marszalek, Madix' Corporate Credit Director.

BUSINESS INTELLIGENCE

Madix' Business Insights department is responsible for approving new product design requests (RFQs) and processing both Requests for Information (RFIs) and Requests for Proposal (RFPs). With so many requests entering the department every day, visibility into the status of projects and requests was imperative. According to Jay Daily, Madix' Director of Business Insights, "in the past, our department had to reference two different systems, one that we logged in to see the details of an RFQ, the second to actually reject/approve the request. Now, all information is housed in one software platform. Similarly, CRM has streamlined the RFP process." Besides a more streamlined experience, the new Dynamics 365 CRM platform makes it easy for the Business Insights department to share information with the sales team. According to Daily, "We set up the software to greatly improve visibility of the statuses of these important projects, so the salespeople will be able to talk to customers more intelligently about what is happening with their major initiatives."

ENGINEERING

A significant part of Madix' implementation was replacing an obsolete project workflow management system. The engineering department had been using a legacy SAP application for product development and management that also drove critical workflows in the company's MRP system. However, the system was unstable and no longer supported. Today the engineering team uses Dynamics 365 for salespeople to submit their new product design requests but also to assist engineering management and the engineers themselves to manage the stages of new product development from conception, design, and up and through material setup. David Wilder, Madix' Director of Product Engineering, explains that "CRM provides us with a greatly improved project management and communication tool. I feel this will aid Madix in getting desired products to market faster." Wilder says that Madix was able to rid itself of a discontinued software platform, provide a better user experience, and give the salespeople visibility to their client's engineering projects. This visibility means that salespeople are now equipped to answer customers' questions about the statuses of their design projects without having to phone or email Madix' engineering staff.

QUALITY ASSURANCE

The Quality Assurance department is responsible for making sure Madix' products are designed to specification. On the rare occasion that a customer discovers a product defect, salespeople use Dynamics 365 to log a field quality report. These field quality reports contain important information for several groups in the company besides QA, such as sales, engineering, and customer service. Dynamics 365 now captures that information in one system and makes it visible to all. "I am glad that we have a platform that proves we take our customer complaints seriously," asserts Daryl Martini, Madix' Quality Assurance Manager. "Now we can share with our customers the root cause and corrective actions that we take." Madix' Quality Assurance department researches each problem and uses the case management features in Dynamics 365 to provide a formal response back to sales. Martini explains that salespeople now have visibility to QA's resolutions, creating an extra layer of trust with customers.

TRAFFIC

Traffic is a busy department with lots of customer and carrier phone calls and emails about freight arrangements. The Traffic team uses Dynamics 365 to auto-log cases for the traffic employees, so they can quickly track and resolve problems with deliveries. Traffic also established uniform procedures for resolving customer requests that work with the new case management system. The result? Sales, customer service, and traffic now have better visibility regarding customers' freight arrangements. Sales and Customer Service team members are also better equipped to answer customer questions about traffic issues. "I believe by having better visibility to their orders and freight arrangements, our customers will be more satisfied with their Madix purchases," stated Toni Dillion, Madix' Traffic Manager.



Sunrise Technologies is a premier global provider for Microsoft's cloud-based solutions, backed by extensive industry expertise in Dynamics 365 and Power BI for apparel, fashion, consumer products, furniture, and manufacturing companies. Sunrise delivers global, Tier 1, supply chain solutions and support that enhance Microsoft business applications for a lifetime. Plus, customers can hit the ground running with industry best practices, pre-built configurations, and a proven methodology.