Briggs Equipment

Equipment Dealer Case Study

"The Fullscope team helped us hone in on the fact that it's not just 'put the software in and expect great results; you're changing process, and you're changing culture. If you are really serious about it and you want to realize the benefits that the CRM platform can provide, the cultural adaption aspect is paramount."

Grant Johanson, Senior Project Manager

BRIGGS
EQUIPMENT

With headquarters in Dallas, Texas, Briggs Equipment (Briggs) is an international business with locations in the US, Mexico, and the United Kingdom. The company is one of the largest materials handling dealers in the world. Industry knowledge coupled with business acumen positions the Briggs brand for continued global expansion. The company is comprised of the following departments: new and used equipment, parts, service, rentals, and solutions.

Key Benefits

- Configurability and business intelligence
- Extend existing Microsoft Dynamics investment
- Strong adoption within organization
- Ability to turn ideas into deliverable CRM functions with Fullscope expertise
- Cost effective

As the business experienced massive growth, leadership came to realize a CRM was vital for delivering a superior customer experience. When choosing a CRM solution, Briggs narrowed the choices from a number of different platforms. To make the right decision, options were evaluated based on 5 categories:

1. Feature/Function
2. Cost
3. Company
4. Technology
5. Implementation

Microsoft Dynamics 365, the Obvious Choice

Through the evaluation process, Briggs found that in terms of feature and function, Dynamics 365 was the best choice as it is highly configurable and has strong business intelligence. The cost proved to be the best value, without hidden costs that come with additional functionality in other products. Prior to the CRM selection, Briggs was already leveraging Microsoft's Dynamics AX for finance and operations functions. Selecting Dynamics 365 gave the company the added benefit of a using a single platform for CRM and ERP and the team felt comfortable with Microsoft's approach to data security (single cloud storage for Sales, Service, and Marketing).

In addition, Microsoft's substantial investments in CRM and Edgewater Fullscope's experience as the go to partner for equipment dealers on the Microsoft Dynamics CE platform gave the team confidence that Dynamics 365 was the right choice.

ROI Measurements

Briggs is in the beginning stages of measuring their payback and ROI from the CRM implementation. To ensure organizational focus, the company started with a review of metrics for the first 90 days. The plan is to focus on adoption in the first 90 days, productivity for the next 3 months, and finally, revenue for 3 months after that. Thus far, Briggs has found strong adoption in terms of the team managing opportunities and job sites in Dynamics. The company plans to focus on re-training users to update contact information and facilitate safety surveys. Long term improvements are expected to be in the 10-20% range for most business outcomes, such as increasing safety awareness, customer retention, and customer growth.

"We had an excellent experience working with Fullscope. The team came with a lot of prior knowledge of the business and were able to immediately add value by shaping ideas into deliverable CRM functions." – Grant Johanson

Johanson noted that, "The Fullscope team went above and beyond on many things and we are very happy with the project outcome. We have had a great experience overall and this implementation is a point of pride for the Briggs CRM team. The Fullscope team is highly knowledgeable and provide leadership that is visionary and business focused."

Initial Target Business Outcomes

When Fullscope first engaged, Briggs targeted outcomes, payback, and ROI in the following areas:

1. Increase Safety Awareness

2. Customer Retention (Retain)

3. Customer Conquest (Gain)

4. Customer Growth (Grow)

5. Customer and Equipment Sales Journey (Contract)

The Briggs CRM Creed

When implementing CRM for the second time, the Briggs team had these strong reasons for doing so:

1. Sales reps need easy access to all customer safety documents, open transaction data, and history.
2. Consistently following a formal sales process supports the goal of being intentional about making safety first, achieving greater financial performance and dealer excellence.
3. Having a database of accurate and reliable information about customers and how they interact with Briggs will lead to retaining existing customers, growing share of wallet, and gaining new business.

Relationship with Fullscope

According to Johanson, the tipping point that made the Briggs team realize the value in CRM was when Fullscope was on site discussing their target business outcomes. Fullscope helped Briggs understand the importance of company culture and change management related to the implementation of new products and processes. The benefits of the CRM would not have been recognized if these factors were not taken into consideration during the implementation process.

Fullscope worked with Briggs to create a clear understanding of the scope of the project, the roles and responsibilities of each contributor, schedule and budget requirements. This ultimately led to a successful implementation.

About Fullscope

Edgewater Fullscope delivers innovative Microsoft ERP, CRM, BI and digital solutions and services on premise or in the cloud to companies in North America and Europe. The award-winning company is one of the largest resellers of Microsoft Dynamics 365 (formerly Dynamics AX and CRM). We also offer strategic consulting delivering a blend of classic and product-based consulting services that help clients reduce costs, improve processes and increase revenue through the judicious use of technology. We continually fine-tune our process and user-adoption programs to give you the maximum return on your investment. This commitment to stay with you throughout your Dynamics 365 journey has earned us the highest customer retention rate in the business.