

HITACHI
Inspire the Next¹

James M. Pleasants Success Story





Dynamics CRM Customer Story

JMP Grows the Business with Hitachi Solutions and CRM Online

CUSTOMER PROFILE

James M. Pleasants Company (JMP) was founded in 1958 as a stocking sales representative for Bell & Gossett products. The company has grown as an employee-owned sales organization over the years by proving its customers with integrated hydronic systems and superior customer service. With more than fifty years' experience and the representation of more than twenty additional lines, James M. Pleasants Company has the expertise and products to provide integrated hydronic, steam, and condensate systems.

INDUSTRY

Hydronics/HVAC

LOCATION

United States

CHALLENGE

When hydronics vendor James M. Pleasants (JMP) set an aggressive goal to double their business, they knew they'd need a CRM platform that could support that growth. They teamed up with Hitachi Solutions, who implemented a CRM solution that supported their business goals and gave them room to grow. JMP sells highly sophisticated heat transfer systems for large buildings and facilities such as hospitals, universities, and industrial sites. Maintaining visibility as a technical leader in the industry is vitally important to them. But when they set a goal to grow their revenue to \$100 million, it became apparent that their sales and marketing management systems weren't up to the task.

JMP was storing most of their marketing and sales data in Microsoft Excel spreadsheets in various locations and offices. These weren't always updated in a timely fashion, and people couldn't always find the customer information they needed. Marketing didn't have up-to-date contacts, and sales teams found it hard to coordinate. And the business leadership couldn't access the data they needed for long-term planning.

As part of its commitment to be a market leader, JMP offers educational seminars that provide contractors and engineers with continuing education credits that assist with renewal of their licenses. They had been promoting these events through thousands of fax blasts. But because their marketing lists were cobbled together from multiple sources, the contact information wasn't always up to date. Many of the fax numbers were no longer connected, or worse, had been switched to private phones. The company began to receive complaints from angry customers getting fax calls to their private lines in the middle of the night.

JMP's sales teams work with many partners and contractors in multiple regions. Without a centralized sales management system, there was little consistency in how the sales offices created quotes. Worse still, they





“The easy navigation and search capability enables new hires to jump in to quickly find products and start intelligently servicing our customers almost immediately.”

Joe Claxton, Manager of Information Technology, JMP

sometimes found different JMP offices were bidding on the same project from different sides.

In addition, without a single view of the sales pipeline, the finance team couldn't project sales and revenue effectively, making it hard to address fluctuations in the market. “We had no visibility” says Joe Claxton, Manager of Information Technology at JMP, “we didn't know where we were at in the market; what the trends are; what the sales pipeline is.”

SOLUTION

JMP knew they needed a customer relationship management (CRM) system that could support their goals for growth and organize their sales and marketing efforts. They evaluated several leading CRM platforms, but it was a Microsoft Dynamics CRM solution designed by Hitachi Solutions that finally won out. JMP was impressed with the depth of the Microsoft solution and its extensibility.

Hitachi Solutions was already using Microsoft Dynamics AX for enterprise resource planning (ERP), and when Hitachi Solutions showed how closely they could get CRM and AX working together, it became a big selling point. Claxton says, “[Hitachi Solutions] has demonstrated a long-term commitment to the Microsoft Dynamics space. They have successfully maintained the same high quality of people and customer support.”

But the biggest reason JMP chose Microsoft was that they knew they'd found a solution that they could grow with. The rich functionality and deep extensibility of the platform impressed them. “We knew that we needed a platform that would not hold us back,” says Claxton. “Once we took a deep dive into Microsoft Dynamics, it stood out as the clear winner. With its expandability and flexibility, we knew right away that we would not outgrow it.”

The new integrated system gives JMP one source for all their customer contacts, marketing automation, and sales management. CRM acts as the contact master and AX acts as the financial master where sales orders are recorded. Hitachi also created a custom quotations engine within CRM so that the sales teams can provide customers with quotes and then



push the information to Dynamics AX so it becomes part of their financial record.

BENEFITS

The new solution had a huge impact on marketing automation at JMP. With a centralized database of contacts, JMP can contact each customer appropriately and ensure that their contact information stays up to date. And having visibility into attendance at their seminars and events is going to help JMP move to a more sophisticated email marketing plan in the future.

Sales management is also greatly improved. The sales teams have visibility into what quotes are being supplied on what projects and can easily share bid information with other offices. "We've got stable pricing through all our markets," says Claxton.

Integration with Dynamics AX also means that JMP has a clear view of the sales pipeline. They can project revenues more accurately and prepare for economic changes in the construction market before the business is affected.

Another benefit of Dynamics CRM is how easy it is for salespeople to adopt and use the solution because it's offered through a familiar Microsoft Outlook interface they already use. Training new hires is also very rapid. In addition to sales productivity, JMP has also enjoyed positive changes to its operational processes. "With recent acquisitions, we have been able to streamline our onboarding process," said Claxton. "The easy navigation and search capability enables new hires to jump in to quickly find products and start intelligently servicing our customers almost immediately."

The cloud solution also does away with VPN bottlenecks or slow connectivity between branch offices. "It made perfect sense for us to move our CRM capabilities to the cloud because we had already moved our Exchange server online," added Claxton. "As we grew, our smaller regional offices were starting to experience some speed and time-out issues with our VPN. Upgrading to Microsoft Dynamics CRM Online has



solved any performance issues and we have seen a significant increase in usage.”

CONCLUSION

Hitachi Solutions turned out to be a great match for JMP. They knew JMP’s business, and they had the expertise to support and extend the CRM solution in whatever way JMP might need. In fact, the company is already planning several extensions of CRM. Claxton adds, “We have just scratched the surface in leveraging the power of this platform and we will continue to tap into new capabilities to meet the needs of our customers, and our sales and marketing teams.

Hitachi is working with JMP on a product configurator that will enable them to provide highly detailed, individualized quotes to customers based on their unique product configuration, save that information in CRM for the sales and implementation teams, and push it to AX for resourcing. This promises to create a huge efficiency gain and eliminate the potential for costly mistakes in product configuration. They also plan to take advantage of the mobility features of Microsoft Dynamics CRM to expand their use of smartphones to access customer information in the field.

Claxton concludes, “With the help of Hitachi Solutions and the Microsoft Dynamics platform, we are now known as being on the forefront of technology and operational excellence in our industry.”

“The easy navigation and search capability enables new hires to jump in to quickly find products and start intelligently servicing our customers almost immediately.”

Joe Claxton, Manager of Information Technology, JMP

