WESTERN COMPUTER

TECHSTREET
CUSTOMER SUCCESS STORY
PART 2

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Michael Klinger
CEO of Techstreet, LLC

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CASE STUDY

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TECHSTREET MODERNIZES ERP AND CRM TO IMPROVE CUSTOMER SERVICE EFFICIENCY

WESTERN COMPUTER MIGRATES LEGACY APPLICATIONS TO MICROSOFT DYNAMICS 365

THE SOLUTION

Techstreet provides subscriptions to industry standards issued by multiple publishers and helps clients access the standards. Soon after the company was acquired by American Association of Mechanical Engineers, the pressure on the Techstreet IT team quickly mounted as the firm needed to migrate applications off the infrastructure hosted by the previous parent company.

With the deadline to complete the move approaching quickly, Michael Klinger, the CEO of Techstreet, knew the organization needed help. The company maintains a lean internal IT team and keeps them focused on developing applications and assisting clients.

"We were also using legacy applications for ERP, sales, and customer service functions that we wanted to modernize," Klinger adds. "So we saw the migration from the previous environment as the perfect opportunity to upgrade our systems. We also knew it would be a challenge to get our end-users to feel comfortable with the new software—they had used the legacy applications for many years."

Klinger first determined Microsoft Dynamics 365 Business Central (for ERP) and Microsoft Dynamics 365 Customer Engagement apps of Sales and Customer Service would provide the advanced capabilities Techstreet required. He also valued how using Dynamics 365 makes it easy to integrate data and processes in other applications across the business. In addition, a wide range of third-party applications can connect easily to the Dynamics 365 platforms for any additional capabilities Techstreet requires.

Just as important as the choice of technology, Techstreet needed to identify a partner to implement and configure the Dynamics 365 solutions. After conducting research and talking to several potential partners, Klinger identified Western Computer as the ideal choice.

PROJECT GOALS

- Migrate enterprise applications hosted by previous parent company.

- Modernize ERP and CRM functionality.

- Integrate ERP, sales, and customer service functions.

"Dynamics 365 functions drive sales behavior, so we can make sure nothing falls through the cracks."

Michael Connor
Senior Vice President of Business Transformation for Techstreet

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"While the other potential partners tended to justify their cost to complete the project, Western Computer focused on detailing the game plan on how they could deliver what we needed," Klinger explains. "This was critical because legacy environments like ours are challenging environments to come into. Western Computer helped us determine the new design we needed, and that gave us confidence they could do the job."

THE BENEFITS

The initial phase of the project (completed in advance of the deadline) focused on implementing the Techstreet applications in its Amazon Web Services environment. This included moving off a custom ERP application to Dynamics 365 Business Central and transferring sales and customer service functions from Salesforce to Dynamics 365 Sales and Customer Service.

Western Computer integrated Dynamics 365 Business Central with the Techstreet subscription platform to enable subscription transactions to flow automatically into the ERP system. Techstreet and Western Computer also designed an automated process in Dynamics 365 Sales that will reduce the amount of time the sales team spends on customer quotes—no more manual processing through spreadsheets and emails. Techstreet is now working with Western Computer to integrate Dynamics 365 Business Central with the e-commerce platform where customers purchase PDF documents.

Another key enhancement for the sales team is the alerts Dynamics 365 Customer Service generates when customer subscriptions are about to expire. The system notifies sales well in advance to schedule a meeting to discuss renewals, and then sends another reminder to confirm the customer is all set, 30 days after closing on the new subscription. "Dynamics 365 functions drive sales behavior, so we can make sure nothing falls through the cracks," says Michael Connor, Senior Vice President of Business Transformation for Techstreet.

Customer service case management—handled by Techstreet team members working from home—was another key improvement area. Dynamics 365 will allow Techstreet to set up self-service options and automated responses to help customers find quick answers to their questions. The reps can also more easily prioritize cases, and they have more visibility into customer activity and interactions with other service reps.

PROJECT HIGHLIGHTS

- Deployed Microsoft Dynamics 365 Business Central and Dynamics 365 Sales and Customer Service.

- Completed migration project on time to avoid hosting costs of previous provider.

- Involved management and users early in the process to increase user acceptance.

"Western Computer has taken us from being limited by IT to an organization where IT enables us to focus on sales and servicing customers—and that's where we make money."

Michael Klinger
CEO of Global Knowledge Solutions

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Western Computer also deployed Dynamics 365 Customer Service Chat Omnichannel to enable chat sessions between the customer care team and customers visiting the Techstreet website. Another key integration was implemented with Talkdesk, which enables Techstreet to analyze metrics pertaining to the performance of the customer care team. Customer care reps can also view client account activity, and any new notes taken during customer calls are automatically uploaded into Dynamics 365, which facilitates follow-up actions with customers.

"Our customer service workflow efficiency has improved significantly," says Klinger. "We also have a more stable environment, and it's easier to track the status of cases through the service metrics we generate. Cases are automatically routed to the correct queue, and we stay on top of any issues we need to address to meet customer needs."

Western Computer recommended several other add-on solutions that integrate easily with Dynamics 365. This helps prevent over-modifying the overall system and includes applications that streamline credit card transactions, document distribution, subscriptions, data integrations, and data storage.

A key factor in the success of the migrations to the new ERP and CRM applications is that Klinger involved the Techstreet management team and end-users early in the project. This helped users embrace the change and has increased user adoption. "Thanks to Western Computer, all of our end-users have bought into the concept of relying on automated processes rather than manually managing workflows through spreadsheets," says Klinger. "Western Computer has taken us from being limited by IT to an organization where IT enables us to focus on sales and servicing customers—and that's where we make money."

"Before we invested in Microsoft technology, we had to hire more people to improve the delivery of our services," Connor adds. "But with the solution Western Computer designed, we can now scale and handle more customer activity efficiently so that we don't have to keep hiring more people. The software helps us execute our services."

WHY WESTERN COMPUTER?
By deploying the Dynamics 365 solutions along with business and industry best practices for ERP and CRM, Western Computer is helping Techstreet achieve long-term success and drive business growth. It's a partnership where Western Computer has gone beyond the initial implementation to keep delivering value to Techstreet.

PROJECT RESULTS
- Subscription activity flows automatically into the ERP system.
- Sales and customer service processes run more efficiently.
- Application performance now stable.
- Metrics help evaluate sales and customer service performance.

"Western Computer takes the unique approach of going beyond providing expertise in programming Microsoft solutions by also understanding how our business operates and adapting technology to align with our corporate culture."

Michael Connor
Senior Vice President of Business Transformation for Techstreet

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Klinger points out the key differentiators between Western Computer and other IT consulting firms he has worked with: "Western Computer is highly respected by Microsoft and the software vendors we rely on. This enables them to collaborate effectively with other technology providers. Just as importantly, they keep us informed about everything that is going on with their projects and often put in extra time when there's something we need right away. They constantly ask if there's more that they can do, and they challenge us if they think we should take a different approach to resolve a technology issue."

Western Computer also provides insights into the different capabilities Microsoft solutions can deliver—making Techstreet aware of the possibilities for further system enhancements. "Those insights are an example of how Western Computer has become an extension of our team," says Connor. "They take the unique approach of going beyond providing expertise in programming Microsoft solutions by also understanding how our business operates and adapting technology to align with our corporate culture,"

Perhaps the best indicator of how Klinger and Connor feel about Western Computer is their desire to continue the partnership. "When we need something, they make sure we get the resources we need," Klinger says. "And if we have an issue with a vendor, they help us work through it. It's good to have a second set of eyes we trust and a partner we know will do the right thing."

ABOUT TECHSTREET

Techstreet™ helps clients stay connected to essential industry codes and standards from around the world to streamline quality and compliance processes throughout the commercialization phase of the intellectual property lifecycle. The company's standards and data management tools help clients maintain national and international compliance while also accessing markets quicker and easier with better and safer products and services. Techstreet is part of Global Knowledge Solutions, a for-profit subsidiary of the American Society of Mechanical Engineers (ASME), which helps the global engineering community develop solutions to real-world challenges.

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