QUANTACRM METHODOLOGY SMOOTHES CRM IMPLEMENTATION FOR OIL IMPORTER

CUSTOMER

AMD Oil Sales, LLC
- Industry: Food Import & Distribution
- [a] Revenue: More than $100 million

CHALLENGE

- Discontinued CRM software
- Ineffective document sharing
- Needed notification system
- Hard to track follow-up process

SOLUTION

- Microsoft Dynamics CRM Online Professional
- Microsoft Dynamics CRM Online Basic
- Microsoft Dynamics CRM Online Essential
- OnTrack CRM Adoption System

RESULTS

- Complete records & claims history help with supplier selection
- Notifications help maintain certification
- Automated follow up improves efficiency

Founded in 1997, AMD Oil Sales LLC is the largest bulk olive oil importer and distributor nationwide. The AMD family also includes AMD Special Oil LLC, a worldwide distributor of specialty vegetable oils since 2004, and AMD Food Sales, launched in 2009 to distribute processed foods and olive oil in the ethnic market segment. AMD has distribution points in North Brunswick, NJ; Ayer, MA; Chicago, IL; and Montebello, CA.

UNSUPPORTED, DISCONTINUED SOFTWARE REQUIRED A CHANGE

Two years after a Goldmine implementation, AMD was using the CRM solely as an email repository. That's when Goldmine announced AMD's software would no longer be supported. AMD decided that their new CRM solution should have greater functionality for document sharing, notifications, and automation.

INTEGRATION WITH OFFICE 365 MAKES DYNAMICS CRM A NATURAL FIT

AMD moved to Microsoft Outlook for email communication and archiving with the intention of embracing Outlook 365, so Microsoft Dynamics CRM was a natural CRM replacement. AMD purchased six Professional, three Basic, and one Essential license of Microsoft Dynamics CRM Online, and an OnTrack CRM Adoption subscription from QuantaCRM.

Dynamics CRM Online Professional is the recommended choice for sales teams. It provides licensed users with access to sales, service, and marketing capabilities for a significantly lower price than comparable offerings from other vendors.

Dynamics CRM Online Basic is designed for entry-level CRM users who need access to functionality such as account, contact, lead, and case management. This license is also designed for business analysts who require reporting capabilities of Dynamics CRM.

Dynamics CRM Online Essential is designed for organizational users who

are not necessarily tied to sales, services, or marketing functions, but still require specific access to activities management and feeds.

The OnTrack CRM Adoption System is a structured approach designed to ensure maximum return on CRM investment, first by focusing on AMD Oil Sales' short-term success with the initial CRM rollout, and then emphasizing ongoing and expanded Dynamics CRM Online training and usage. OnTrack is a fixed-price subscription service that comes with a money-back guarantee.

STAYING ON TRACK TO ENSURE IMPLEMENTATION SUCCESS

After an unsuccessful implementation with another Dynamics CRM partner, AMD worked with Baroan Technologies, an MSP serving New Jersey's local businesses since 1997. Together, they decided QuantaCRM would be an excellent fit to restart AMD's CRM project.

QuantaCRM impressed AMD with an organized, customer-focused, and highly responsive installation process and OnTrack plan for onboarding and educating employees. AMD especially appreciated the ongoing education and support, as well as the focus on getting them up and running quickly on CRM.

To start, AMD relied on QuantaCRM for guidance in implementation and beyond, as employees became accustomed to Dynamics CRM.

As time passes and the AMD staff grows more familiar with their new software, they see the OnTrack CRM Adoption system as an ongoing value, since they can take advantage of deep-dive sessions and monthly lunch-and-learns to learn more about their CRM and continually drive its ROI.

RECORDKEEPING, REMINDERS, AND FOLLOW-THROUGH INCREASE PRODUCTIVITY

AMD has found a CRM package that can be leveraged by multiple teams and one that adds value through accurate, transparent recordkeeping. Leads are logged effectively, ensuring follow through by salespeople.

Especially helpful to AMD is the **claims history** that

Dynamics CRM enables, which saves AMD money when dealing with suppliers – since they can make better decisions about which suppliers to utilize. Corrective actions are stored in the system, which also helps with supplier selection.

In addition, **complete records** on supplier and vendor interactions direct AMD's future decisions on which to use, depending on what variable—price, proximity, etc.—must be optimized.

AMD stores SQF (safe quality food) documents in CRM and OneNote, creating tasks for when the documents are about to expire and sharing the information across the organization. **Notifications** let AMD know when they need to acquire new documents, ensuring they maintain their certifications.

Purchasing uses OneNote in Dynamics CRM to distribute information companywide. By keeping all related information in one place, they increase efficiency.

Cases are logged for insurance claims and have replaced paper files.

Lastly, AMD has added **automation for samples requests** by emailing the request for shipment and scheduling a follow up for a salesperson. This, again, increases efficiency, as well as improves sales effectiveness.

About QuantaCRM

QuantaCRM is a Microsoft Dynamics CRM Online and Microsoft Dynamics 365 reseller based in Chicago, providing national sales, consulting, implementation, training, and technical support to small and medium-sized businesses.

Visit www.quantacrm.com to learn more.

Contact QuantaCRM at sales@quantacrm.com or 844.244.6310.