

KEEPING PACE WITH RAPID GROWTH USING QUANTACRM METHODOLOGY

CUSTOMER

U.S. Compliance Corporation

- Industry: Environmental, health, and safety professional services
- Revenue: less than \$10 million

CHALLENGE

- Larger workloads due to rapid growth
- Poor data consistency and accessibility
- Limited workflow automation
- Difficulty communicating and coordinating across divisions
- Inability to track resource utilization and profitability across divisions

SOLUTION

- Microsoft Dynamics 365 for Sales
- Microsoft Dynamics 365 for Team Members
- OnTrack CRM Adoption System

RESULTS

- More communication and coordination
- Improved data consistency
- Streamlined sales & revenue processes
- Tracking sales and resource utilization
- Increased access to CRM system & data

United States Compliance Corporation (U.S. Compliance) is an environmental, health, and safety professional services firm with nearly 30 years of experience in worker safety (OSHA) and environmental (EPA) compliance, and expertise in local, state, and federal OSHA and EPA regulations. U.S. Compliance helps customers attain and sustain OSHA and environmental compliance so they can focus on realizing profitable growth and productivity.



RAPID GROWTH REQUIRES BETTER INTRACOMPANY COMMUNICATION

U.S. Compliance had been using multiple records solutions across divisions, including SalesLogix for sales, Quickbooks for accounting, and Access and Excel for operations. These solutions did not communicate well with each other, so U.S. Compliance was relying heavily on Outlook to connect their divisions, particularly sales and accounting.

Due to rapid growth, U.S. Compliance needed customer relationship management (CRM) and professional services automation (PSA) solutions that would improve data consistency and accessibility, allow for increased workflow automation, and improve communication and coordination across divisions as the company took on larger workloads. They also wanted to be able to track resource utilization and profitability, which they could not do across their fragmented solutions.

INTEGRATED DYNAMICS SYSTEM PROVIDES ROBUST CRM SOLUTION PLUS PSA FLEXIBILITY

U.S. Compliance first investigated PSA solutions with built-in CRM like Autotask and ConnectWise, but decided the CRM components were not robust enough to meet their needs. Although some team members had initially believed Microsoft Dynamics 365 was more than they needed, U.S. Compliance found that Dynamics 365:

- captures information regarding activities, contacts, prospects, and customers, providing them with the robust data they needed to analyze and improve sales processes and other operations.

“We got referred to Quanta, had that initial discussion, and felt comfortable right from the start. We were able to negotiate the level of implementation and support we needed at the price we needed.”

- is highly customizable, enabling integration with the Assistance PSA Suite at launch.
- offers cost-effective licensing and capabilities for both SMB- and enterprise-level operations, and will therefore scale well with growth.
- integrates seamlessly with Microsoft applications like Outlook and Office that U.S. Compliance was familiar and comfortable with.

U.S. Compliance therefore decided to use Dynamics 365 as their CRM, and to build their PSA system on top of it using the PSA Suite by Assistance Software.

U.S. Compliance purchased 20 Full and 44 Team Member SMB licenses of Microsoft Dynamics 365 for Sales, plus an OnTrack CRM Adoption Preferred Plan subscription from QuantaCRM.

Dynamics 365 for Sales 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 365 for Team Members is designed for entry-level CRM users who need access to basic CRM functionality such as account, contact, lead, and case management. U.S. Compliance is using these licenses for non-sales team members who need access to the Assistance PSA project management solution.

The **OnTrack CRM Adoption System** is a structured approach designed to maximize ROI by first focusing on short-term success with the CRM rollout, and then on ongoing progress with Dynamics 365.

OnTrack is a fixed-price subscription service that comes with a money-back guarantee.

PRACTICAL PLAN AND STEADY SUPPORT LEAD TO SMOOTH IMPLEMENTATION

U.S. Compliance was referred to QuantaCRM by Assistance Software. Although U.S. Compliance had considered multiple PSA systems and vendors, they needed only one conversation with QuantaCRM to feel comfortable with our Success Coaches and the OnTrack Adoption System. They were impressed by the highly

organized implementation schedule and in-depth training and support systems available to OnTrack subscribers.

According to Amanda Caspers, Director of Operations, and Shalaine Lacher, Sales & Marketing Coordinator, the Dynamics 365 implementation with OnTrack was very smooth. U.S. Compliance already had CRM background and buy-in from their time with SalesLogix. The challenge, therefore, was learning which Dynamics 365 entities worked best for which processes, and then customizing those entities to better serve clients and prospects while keeping the system easy to use.

Ms. Caspers and Ms. Lacher credit the OnTrack Video Learning Portal and frequent support from QuantaCRM Success Coaches and IT for helping them achieve these goals and making their Dynamics 365 implementation the smoothest of their various implementations. They point to the QuantaCRM team's flexibility, reliability, and creativity as particularly helpful and impressive.

IMPROVED COMMUNICATION AND REPORTING ENABLE BETTER PROCESSES, FUTURE GROWTH

U.S. Compliance is already seeing more communication across divisions, improved data consistency, and streamlined sales and revenue processes. Implementing a company-wide solution has also given everyone who sells access to CRM, which was not the case previously.

Ms. Caspers and Ms. Lacher believe Dynamics 365 will put them on a quicker path from closing to invoice. They have also begun tracking sales and resource utilization to better understand their company's profitability. Long-term, they will have access to regular reports on these important benchmarks.

About QuantaCRM

QuantaCRM is a Microsoft Dynamics 365 for Sales 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.

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