



*BI Analytics for Dynamics CRM Helps High Concrete
Deliver Timely, Accurate Reporting and Analysis*



An Affiliate of High Industries Inc.

High Concrete is part of the High Industries family that provides steel bridge fabrication and erection services, precast/prestressed concrete building systems, carbon steel processing and distribution, full service real estate solutions, design and construction services, hotel accommodations, and safety, health, and industrial hygiene consultation and training.

High Concrete encountered several challenges in understanding their CRM data. Their CRM reporting involved lengthy and error prone processes and they knew there must be a better way. After seeing a demonstration of Strategy Companion's **BI Analytics for Dynamics CRM**, High Concrete knew they had found a solution that would easily integrate with their CRM system and provide flexible reports more quickly and accurately, giving them the ability to better understand business trends on a daily basis.



Industry

Manufacturing / Construction

Solution

BI Analytics for Dynamics CRM

Business Challenges

- *Lengthy, manual processes to extract CRM data, load into Access and create reports*
- *Finding a reporting solution that easily integrates with Dynamics CRM*
- *Modifying and creating new reports quickly*
- *Displaying data in an intuitive and flexible manner*
- *Providing timely reports to executives so they can respond quickly to business needs*
- *Executive demand for dashboards to display multiple metrics simultaneously*

Customer Quote

“Using BI Analytics for Dynamics CRM, I quickly discovered that I could build a report to meet our needs almost immediately.”

– Gary Reed, Manager of Customer and Technical Information for High Concrete

High Concrete depends on visibility into the CRM system to effectively manage the sales pipeline and was looking for a solution that offers powerful and flexible reporting and is intuitive for both the sales team and executive management

Overview

“Go-to guy” is just one of the many roles Gary Reed, Manager of Customer and Technical Information, performs at High Concrete Group. “I’m the one everyone comes to for reporting and analysis,” says Gary. The High Concrete Group produces and sells precast and prestressed concrete building systems. Many buildings and parking garages use products made by High Concrete. They are part of the larger family of High Industries in Lancaster, Pennsylvania.

High Concrete uses Microsoft’s Dynamics CRM 3.0 as a hosted application. Over time, Gary received more and more requests for reporting from the CRM system. Because High Concrete uses the CRM system a bit differently in that they track projects, not people, Gary found it challenging to get the reporting he needed directly from the system. The standard reports that came with Dynamics CRM just didn’t work for Gary.

The business depends on visibility into the sales pipeline, including understanding which projects are pending, which are high-probability leads, and which are general leads. So Gary created his own workaround in order to meet this business need.



Manual Processes were Complex and Error-Prone

Having created an Access database, Gary extracted data from Microsoft's Dynamics CRM into a flat file in Excel and loaded the data into the Access database. Then Gary created reports in response to the business questions he received. This manual data process was vulnerable to data integrity issues. Because of the many hand-off points, there was a potential for extracts and loads to fail and data to be missed.

Also, when users were done inputting new data and wanted to now see reports, they could not easily do so. The data again had to be exported to Excel from the CRM system, manipulated, and formatted for reporting. If this data validation process found any errors, the whole process was performed again. These lengthy manual processes resulted in delays in getting information to the decision-makers.

The first idea Gary had was to work with a third-party consultant who specialized in CRM. After several months, he still did not have the reports he needed and the consulting fees kept rising. The CRM consultants decided to recommend a new solution, **BI Analytics for Dynamics CRM** from Strategy Companion. They had recently seen this solution and felt it just might offer what Gary needed.

BI Analytics for Dynamics CRM Delivers Simple and Powerful CRM Reporting

The consultants introduced Gary to the Strategy Companion team, who provided an online demo showing just how quick and easy it is to install the solution and begin reporting from Microsoft's Dynamic CRM system. Strategy Companion's BI Analytics accesses data from the CRM system and delivers pre-built, interactive analytical reports. **BI Analytics for Dynamics CRM** leverages Microsoft's SQL Server Analysis Services OLAP cube technology, allowing users to slice and dice data, creating their own custom views. Powerful charting tools provide visual representation of the data for easy interpretation. Gary saw the value immediately and was anxious to get started.

High Concrete looked to BI Analytics for Dynamics CRM to integrate with their Microsoft Dynamics CRM and automate the reporting process, reducing the time it took to provide reports to the executive team and significantly increasing data quality

BI Analytics has reduced the time it takes to create new reports from days to minutes, allowing the business to quickly respond to changing market trends

After spending some time working with the service provider to resolve logistical and access issues, the Strategy Companion team went to work. The team interviewed Gary to better understand the business needs, the reporting requirements, and what type of analysis needed to be done. Within days, the first version of High Concrete's new CRM reporting system was ready for viewing.

After a series of build-and-review iterations, Gary now has a tool that enables him to respond to requests for reports and analysis in minutes instead of days or even hours. As his executive team looks at the data and has additional questions, Gary can respond instantly. "What I really needed was the ability to change a report on the fly and now I can just change a filter and get results immediately" says Gary.

Because **BI Analytics** has removed the need for Gary's manual data processes, he is able to respond to business needs quickly and with the confidence that the information is accurate. **BI Analytics for Dynamics CRM** has also changed the way the sales team interacts with the data. Now, instead of a multi-step activity to process and see the data, the team enters it, waits for the nightly cube refresh, and can validate and analyze the data the very next day. "BI Analytics has made my job easier" says Gary. "I am able to create fewer reports, and by just changing parameters, I can produce different views quickly."

In addition to the quick and interactive reports Gary can get, he's enjoying exploring the many different visualization tools that **BI Analytics for Dynamics CRM** provides. With dozens of charting options, from basic pie and bar charts to radar and even candlestick charts, visually representing data has never been easier. There is a visualization for every purpose and each one can be customized by the user, without any need for technical knowledge or assistance.

Gary says working with the Strategy Companion team was a pleasure. "They were friendly, easy to work with, and very responsive. In fact, they even helped us with our data issues after hours just to make sure we were successful."

Using **BI Analytics for Dynamics CRM**, Gary no longer minds his role as the "go-to guy".

Strategy Companion provides the most advanced and easy-to-use Business Intelligence front-end available for the Microsoft SQL Server platform. Our Analyzer™ solution is now making Self-Service BI a reality, leading to better business decisions and results for organizations worldwide

*To learn more about Strategy Companion, please visit:
www.strategycompanion.com
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BI Analytics for Dynamics CRM advantages

- *Completely integrated within Dynamics CRM 4.0*
- *25 pre-built, ready-to-use analytical reports*
- *Easy-to-use, interactive analytics*
- *Wide range of powerful analytical functions*
- *Dozens of advanced visualizations*
- *View multiple analytic reports and dashboards*
- *100% zero-footprint web architecture*
- *Internet Explorer and Outlook-client ready*
- *Streamlined 20-minute install*
- *CRM cube built automatically during install*
- *Security integrated with Dynamics CRM*
- *Multi-language support*

