

Customer:

Domaine

Web Site:

www.domainewinestorage.com

Location:

St. Louis, Missouri

Industry:

Professional Services



Case Study Highlights:

- Resolved prior data migration errors completed by another vendor
- Automated processes to result in accurate billing
- Formalized sales process

“ With training and mentoring from Turnkey Technologies, I am able to configure our Dynamics CRM to serve specific business needs. I’ve never been known as a ‘tech savvy’ person until now. We have had success with our CRM investment thanks to the partnership with Turnkey Technologies! ”

- Lauren McIntosh, Operations Manager, Domaine

The Company

Domaine provides superior services and facilities to wine collectors. They are one of the few operators in the country to offer receiving, inspection, inventory, packing and shipping consolidation as part of a full-service approach. Domaine was incorporated in 2006 upon opening the flagship wine storage facility in St. Louis, Missouri. As demand became apparent, additional facilities opened in Chicago (2009), New York Metro (2011), and Washington, D.C. (2012).

The Situation

When Domaine purchased a fourth wine storage facility in 2012, the executive team realized the need for a centralized data storage and management platform to support the company’s growth. Dynamics CRM was chosen to replace multiple systems, including subscription-based project management software and Microsoft Outlook for contact management.

Unfortunately, the software vendor that implemented Dynamics CRM was unable to accurately import Domaine’s data into CRM. Domaine was manually scrubbing the data, which was time-consuming and inefficient. The initial project was not beneficial to business operations and not yielding an ROI.

The Solution

After the other vendor failed to effectively complete Domaine’s data migration, Turnkey Technologies was hired to help Domaine reach their ROI.

Turnkey Technologies, Inc., a Microsoft Dynamics CRM Certified Gold Partner, has the expert staff required to resolve Domaine’s data migration issues. With deep knowledge of Dynamics CRM implementation, development, and a variety of industries, the Turnkey team worked with Domaine to prioritize business needs and develop a plan to resolve the implementation problems together.

“Turnkey Technologies took the time to understand the details of our business, which made Dynamics CRM a successful tool to support our needs.”

*Katherine Lazar, COO
Domaine*

About Turnkey:

Turnkey Technologies, Inc. is a Gold Microsoft Dynamics ERP and Gold Microsoft Dynamics CRM certified partner with a focus on helping businesses reach their full potential. Turnkey offers comprehensive services, including pre project analysis, solution implementation, customization, data conversion, cloud hosting, training and support.

- Over 20 years of experience
- Fully equipped training center
- Top 10 Microsoft Dynamics partner (Sourcing Line)

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The Results

Formalized Sales Process

Domaine uses Dynamics CRM primarily for the proposal-contract-order-invoice workflow. Users enter information on a new sale in one place as a proposal. Following revisions requested by the client, the proposal can be converted into a contract with two clicks. Once the contract is accepted, Dynamics CRM creates an order and then an invoice for payment.

“Once we have the information, creating a proposal takes less than five minutes,” says Lauren McIntosh, Operations Manager. “Our old process probably took 20 minutes, but the real benefit is the reduction in error and data re-entry now that we use Dynamics CRM.”

Accurate Billing with Automated Contract Renewal Process

Within the vast amount of wine-related services provided by Domaine, wine storage business processes become complex with multiple warehouse locations and diverse contract terms for clients. Dynamics CRM automates the storage contract renewal process, which catches potential missed revenue, improves client relations, and supports client sales.

“After opening our fourth wine storage facility in Washington, D.C. in 2012, we decided to use Dynamics CRM to automate our storage renewal process,” says McIntosh. “This automation supports our continued growth by giving us more time to focus on acquiring new sales and strategic partnerships, rather than spending time on billing and data entry.”

360-View of Key Performance Indicators

After on-site training and mentoring from the Turnkey team, McIntosh has become a CRM Power User without a background in technology. The executive team looks at Dynamics CRM as a “spreadsheet replacement” to efficiently and proactively review KPI’s for various business functions and departments. McIntosh was able to create a new entity with custom fields and forms to track, report and analyze everything from the hours spent on a project by the account management team, to the number of boxes filled by the procurement team, to cases sold by a sales team. This capability empowers Domaine with up-to-date Business Intelligence (BI) to make well-informed business decisions.

Future Plans

Industry Software Integration

Domaine is able to use the flexible, modern platform of Dynamics CRM to their advantage. As the business grows, they plan to integrate third party warehouse management software to Dynamics CRM.