



Industry

- Business Services
- Employee Benefits

Products

- Microsoft Dynamics CRM Online

Challenge

Trion's sales team was using a standard GoldMine CRM system, but adoption was low because the application was difficult to use and team members did not like the interface.

Solution

Neudesic supplied a Microsoft Dynamics CRM Online solution, which provided Trion's sales team members immediate access to customer data without the need for additional IT support

Benefits

- Quick user adoption
- Familiar Outlook-style user interface operating at a much faster rate
- Reduced IT team support time & costs
- New sales platform

Support and Sales Platform

Trion has changed the way employers buy and manage employee benefits, helping hundreds of companies reduce costs and maximize the value of their health, life, disability and voluntary programs. Through a unique fusion of consultative expertise, brokerage purchasing power, administrative support and internet technology, Trion develops innovative benefit solutions for local, regional and Fortune 1000 companies.

Trion aligns professionals with roles that focus on their strengths and provides them with the resources and tools they need to succeed. Support services include strategic, financial and plan management.

[Neudesic] responded well. They actually answered my questions. Most of the people we reached out to actually didn't. They were very honest about any kind of capability issues and anything that we might want, which was a big sell for us.

Laura Tantaros
Trion Sales Operations Manager

Project Highlights

- CRM system user adoption was down due to an unfamiliar interface that was difficult to use
- Large amounts of customer data was not being recorded, and, ultimately, was lost
- Significant IT resources were needed to maintain Trion's outdated CRM system
- The company wanted an online solution that was both scalable and easy to use
- Microsoft Dynamics CRM provided immediate access to data without the need for excessive IT support
- User adoption increased as the sales team was already familiar with the Outlook-style interface
- Neudesic became an extension of Trion's own IT team, providing the company with a solution for their Customer Relationship Management needs



Support and Sales Platform

The Challenge

Trion's sales team was using a standard GoldMine CRM system, but adoption was low because the application was difficult to use and team members did not like the interface. The system's lack of acceptance meant large amounts of customer data was not being recorded into the database and, ultimately, was lost. In addition, the GoldMine system required significant technical support, and Trion's IT Department was unable to devote the time needed to enhance the platform's user interface and, therefore, make it more widely adopted in day-to-day operations

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*Laura Tantaros
Trion Sales Operations Manager*

The Solution

"We knew that we wanted to minimize our IT's involvement," said Trion Sales Operations Manager, Laura Tantaros, "so we were looking at any kind of solution that we could do in either a hosted format or an online format. It was very easy to get to a short list with just that criteria. It needed to be one application. It needed to be familiar buttons, familiar look and feel, something that looked like it was seamless."

Neudesic supplied a Microsoft Dynamics CRM Online solution, which provided Trion's sales team members immediate access to customer data without the need for additional IT support. Neudesic's solution made the interface more intuitive, increasing user adoption and providing a hosted platform that reduced reliance on Trion's over-burdened IT resources.

The Benefit

Neudesic became an extension of Trion's own IT team, providing the company with a solution for its Customer Relationship Management system that proved to be the answer to Trion's problems with low adoption rates and high maintenance costs. As avid Outlook users, employees were quick to adopt the new CRM system, which featured a more intuitive interface and enhanced workflow capabilities. The online solution also took the burden off of Trion's IT team and has given the company's sales team the platform to generate new business.

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workflow capability was a big plus," said Laura Tantaros. "I can do the majority of what I need by myself, and I have a consultant so when I get into the weeds on something, or I need something that I think might be a little more sophisticated, I simply reach out to them to assist me."

Commenting on Neudesic, Tantaros said, "They responded well. They actually answered my questions. Most of the people we reached out to actually didn't. Neudesic was very honest about any kind of capability issues and anything that we might want, which was a big sell for us. Additionally, communication was really strong out of the gate with them. We had other consultants come in and it was a struggle for them to understand me and for me to understand them, because I'm not that technical...Early on, we established a lot of trust, and, for me, that's what's now critical with our on-going relationship with Neudesic...We have had so many experiences where they have come up and reestablished that trust."