

## Affiliated Helps Ohio Gratings Double Productivity, Projects 15% Increase in Revenue Growth with Integrated Microsoft Dynamics CRM

### Introduction

Ohio Gratings, Inc. is a leading manufacturer of aluminum and steel bar grating. Founded in 1970, the company participates in all facets of the grating industry, from design to engineering, fabrication and distribution. Operating four manufacturing facilities — in South Carolina, Texas, Utah and at its Canton, Ohio, headquarters — the company serves a global market with 20 main product lines and literally hundreds of thousands of differently configured grates, used on everything from commercial buildings to bridges, stairwells, roads and oil rigs.

### The Challenge

Ohio Gratings enjoyed solid growth through the recent recession, nearly doubling its end-user base and number of employees (340), while cranking out up to 250 quotes a day to customers around the globe. Yet, despite this enviable growth surge, management realized the company might have been underperforming, due to poor internal communications and an inefficient sales cycle and disparate technology systems. "We used different software solutions for estimating, quoting, email and sales tracking, none of which were integrated," recalls David Bossart, Business Process Manager for Ohio Gratings. "We desperately needed to unify these systems, and needed someone who could pull it all together for us."

### Affiliated Recommends Microsoft CRM

After interviewing several technology services companies, Ohio Gratings

selected Affiliated, due to its in-depth knowledge of manufacturing and experience with Microsoft products. Following a thorough review and analysis, Affiliated recommended Microsoft Dynamics CRM 2011 to unify the company's handful of disparate systems in a single, flexible CRM (customer relationship management) solution. "With Microsoft CRM, we wanted to create a top-of-mind awareness throughout the organization about our customers and sales opportunities," Bossart says. "We didn't have that before."

Affiliated implemented and customized the on-premises version of Microsoft CRM, integrating it with Microsoft Outlook and TDCO Buy Design Configurator, a powerful estimating program. For everyone from management to the sales and marketing teams, this move changed how business gets done and how information is stored and shared at Ohio Gratings. "We're all on the same page now, sharing information in a central repository, instead of working separately in little kingdoms," Bossart says.

### Improving Sales and Revenues

Take quotes, for example. The company's prodigious quoting system — 250 a day, or more than 90,000 quotes a year — is central to its sales success. Prior to CRM, quotes were shared through Outlook on Excel spreadsheets, which Bossart calls "time-consuming and inefficient." Affiliated helped the company build workflows to automate quotes, saving the sales team about half the amount of time it once took to estimate project costs, generate quotes and email them. Plus, all quotes are now centralized on the CRM application, making them



*"We believe Microsoft Dynamics CRM was the missing link we needed to transform how business gets done in the grating manufacturing industry. We're now a much more efficient and productive one-stop-shop for our global customers."*

*-David Bossart, Business Process Manager, Ohio Gratings*

### Challenge

A leading Ohio manufacturer wanted to unify its estimating, quoting, ERP and communications functions within Microsoft Dynamics CRM solution that would improve tracking of sales activities, strengthen customer service and boost revenues.

### Solution

Affiliated implemented and customized the on-premises version of Microsoft Dynamics CRM 2011, and integrated it with email and estimating software. They also trained in-house software developers to handle future programming needs.

### Benefits

Expects to generate 10-15% revenue growth year over year by improving productivity, streamlining the sales cycle, automating key workflows, and gaining a competitive advantage through improved pricing controls.

### Key solutions and services

Affiliated Development, Implementation & Training Services  
Microsoft Dynamics CRM 2011, On-Premise Edition  
TDCI Buy Design Configurator  
Microsoft Dynamics AX



**OHIO GRATINGS, INC.**

easily retrievable and viewable from any mobile device.

The Microsoft Dynamics CRM solution also provides a sophisticated tracking and notification system that allows the sales and marketing teams to monitor and follow up with customers regularly. "Now everybody knows what's going on — who are customers are, where they are in the sales cycle, and when we need to contact them again to optimize sales," Bossart says.

In all, Bossart expects that with CRM in place, they will hopefully gain "a minimum 10-15 percent revenue growth, year over year. We set out to add revenue by becoming more efficient and productive, and with Affiliated's help, that's exactly what we're doing," he says.

## Gaining a Competitive Edge

Additionally, Affiliated is providing Ohio Gratings with advanced developer training, in an effort to help their staff customize and fine-tune the solution on their own. "Affiliated is always there for anything we need, but they've trained our in-house staff to handle the most sophisticated programming," Bossart says. "Over the long run, we're more self sufficient and it's another big savings."

The Microsoft Dynamics CRM solution is also helping Ohio Gratings gain a competitive edge by keeping pace with changing market prices of aluminum and steel. In the past, the company might update prices two or three times a year. Now a price adjustment can be made in real-time across product categories, not just product by product. "By automating these changes across the board, we become more price sensitive for our customers," Bossart says.

Looking ahead, Affiliated plans to help Ohio Gratings integrate Microsoft Dynamics AX — the enterprise resource planning solution — with the current estimating and CRM solutions. With ERP in place, customers will be able to design gratings online, further streamlining how grating products get designed, manufactured and distributed. Adds Bossart, "We're transforming how we do business, how we lead our industry—and Affiliated is helping to guide us through that process."

## About Affiliated

Since 1993, Affiliated has been helping growing and midmarket organizations identify, evaluate and implement technological solutions to improve operational efficiency and increase revenue. As a member of the Microsoft® Partner Network certified in both Microsoft Platform and Microsoft Dynamics CRM solutions, as well as a VMware Enterprise Solution Partner, Affiliated specializes in providing complete technology solutions including both software and services to organizations in multiple industries including distribution, manufacturing, health care, professional services, government, and not-for-profits.

## Learn more about how Affiliated can benefit your business.

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*"We're huge fans of Affiliated. Their knowledge of the manufacturing industry, technical expertise and stick-to-itiveness in tricky problem-solving makes them an excellent partner to have at your back."*

*-David Bossart, Business Process Manager, Ohio Gratings*