

PARTNER SUCCESS

Better Prospecting, Better Relationships

Tightly Integrated Solution Profiles Best Customers to Uncover New Prospects

D&B AllianceNetwork Partner



Organization Profile

Management consultants and system integrators with expertise in a variety of areas, collaborating with customers to solve business and technology challenges.

Location

Ottawa, Canada

Customer

Complete Innovations, a leading provider of mission-critical fleet, asset and mobile workforce management solutions.

Business Needs

- Profile and enrich current customer data
- Find new sales leads using business data including industry and revenue
- Add new prospects directly into Microsoft Dynamics CRM with a single click, eliminating data entry errors

Solution

D&B360 for CRM gives sales reps the visibility they need to rule out existing customers and find new sales opportunities.

Introduction

Complete Innovations provides fleet, asset and mobile workforce tracking and management solutions. The company has experienced rapid growth for 13 consecutive years, and, as a result, needed better tools for prospecting and lead generation to tap into new markets.

The solution? The company partnered with A Hundred Answers, a D&B AllianceNetwork Partner that recommended the D&B360 for CRM solution. Complete Innovations is one of a handful of companies that has successfully integrated and customized Microsoft Dynamics CRM to an ERP system, which it uses to run every aspect of its business, including sales and marketing. Adding D&B360 to the mix meant the CRM could also give its sales representatives the visibility they needed to target the right business opportunities. The combined solution also helps the marketing team get to know the company's current clients better, which helps with its targeting efforts.

“It’s great for our sales and marketing teams, who drove us to purchase the solution. Now that we have it up and running, we can explore how this tool will help us manage data in the CRM more efficiently, generating even better results.”

Brad Freeman, Manager of Business Processes and Operations, Complete Innovations

The Challenge

Complete Innovations was having difficulty generating leads for the sales team quickly and efficiently. In addition, the company was facing challenges in identifying demographic characteristics of existing customers, including their industry and company size. Accurate data is critical to customer insights.

The Solution

With a fully integrated solution of Microsoft Dynamics CRM with D&B360, sales and marketing staff at Complete Innovations are now able to get access to a depth and breadth of D&B data, including 99+ unique data fields, without leaving the familiar interface of Microsoft Dynamics CRM. Two views into the D&B data are especially helpful: Full Family Tree, which shows relationships between parent companies and their subsidiaries, and Look-a-Like Prospecting. Look-a-Like Prospecting enables sales reps to use the profile of their best existing customers to build a list of prospects with similar characteristics. They can add these new, qualified prospects to their CRM with a click, avoiding data entry errors. Using some simple de-duplication routines, users can ensure there's no record duplication, and can begin outreach to the remaining companies on the prospecting list, where there's zero overlap with their CRM records.

The solution also provides valuable data that can support marketing and sales campaigns into new industries or sectors, such as:

- Industry data, such as SIC codes
- Company size and revenue

- Financial data and credit-worthiness
- Professional contacts, including email and phone number

With the installation of D&B360 for CRM, the Complete Innovations team will receive continuously updated D&B data, available for immediate download at the push of a button.

“We deployed D&B360 because we needed features like Look-a-Like tightly integrated with the CRM – that was our No. 1 requirement.”

*Brad Freeman, Manager of Business Processes and Operations,
Complete Innovations*

Results

Complete Innovations was able to combine Microsoft Dynamics CRM with D&B360 quickly and seamlessly. Their sales representatives now possess an intuitive tool that enables them to generate new leads efficiently and achieve better close rates. In addition, the marketing team has a very clear idea of who their buying personas are, from which industries, which helps them raise ROI on their marketing spend.

Going forward, the company's manager of business processes looks forward to the many ways the company might use the enhanced platform to grow its business.

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