

Customer

Santinelli International



“ The Turnkey team understands our business, recognizes our pain and has developed a plan to transform our customer-facing systems accordingly. It’s because of their empathy that they are able to devise comprehensive solutions that really work. ”

- Bruce Moreno, IT Director, Santinelli International

Company Facts**Location:**

Hauppauge, NY

Industry:

Medical/Optical Devices

Number of Employees:

67

Website:www.santinelli.com**Technology Used**

Dynamics CRM

Dynamics GP

Scribe

Business Benefits

Improved User Efficiency

Accessible Customer Information
(GP-CRM Integration)Professional, Flexible Quote
Documentation**Business Challenge**

Santinelli International distributes and services high-end lens finishing equipment to eye care professionals across the United States. Joseph Santinelli, who played an instrumental role in developing the world’s first diamond bevel lens edger, founded the company in 1973. It has remained family-owned and operated ever since. With award-winning equipment and services, as well as strong partnerships with industry leaders including Nidek, IDOC and Vision Source, Santinelli is the number one provider of lens edgers in America.

With countless customers and customizable products, Santinelli requires sophisticated technology to track and manage various components of the business. One area where the company found itself struggling was the generation of quote documents. Quote creation previously took place in an Excel document, but this method became unsatisfactory over time due to a lack of flexibility, excessive time consumption and an unsophisticated, difficult-to-interpret format from a customer perspective. Difficulties with sales associates adopting this process and issues with customer comprehension led Santinelli to seek consultation with Turnkey Technologies on a solution.

Solution

Santinelli initially partnered with Turnkey to assist in multiple areas of the business relating to the Microsoft Dynamics platform. After a holistic evaluation of the firm’s needs and priorities, Turnkey personnel decided to adopt a multi-phase approach, beginning with the development of a new quoting system that emphasized comprehension, detail, flexible pricing and customer accessibility.

The new quote document is directly integrated with Dynamics CRM and does not require any third-party plug-ins. It is also upgradable, allowing it to keep up with new versions of Dynamics CRM and Santinelli’s changing needs. Additionally, the document is trackable through a custom dashboard that shows a total of quotes created, quote status, quotes by user per month and open opportunities.

The Turnkey Difference

“Turnkey’s technical and functional skills with Dynamics CRM is a great asset. To be able to build our documents and integrate them seamlessly with CRM has made the quoting process more accessible and user –friendly. These improvements are a true testament to the quality of their people.”

- Bruce Moreno, IT Director,
Santinelli International

About Turnkey Technologies

Turnkey Technologies, Inc. is a Gold Microsoft Dynamics Partner serving local, regional and national customers since 1994. We are a client-focused solution provider with a passion for maximizing value for our customers.



Gold Enterprise Resource Planning
Gold Cloud Customer Relationship Management
Gold Application Integration
Silver Cloud Productivity
Silver Data Platform

Business Benefits

Improved User Efficiency

In moving from the rigidity of Excel spreadsheets to the streamlined CRM quote document, Santinelli’s sales associates were able to reduce time, keystrokes and clicks when creating quotes. Where entering information into Excel required an average of 15 minutes, 100 characters and 20 clicks, the CRM quote document requires an average of just three minutes, 20 characters and seven clicks. That’s an 80 percent reduction in both time consumption and characters, a 65 percent reduction in clicks, and an overall 75 percent reduction effort in this stage of the quoting process.

Accessible Customer Information

Thanks to integration between the quote document and CRM, as well as between CRM and Dynamics GP via Scribe, roughly 70 percent of an existing customer’s information auto-populates into a new quote. This eliminates the need for manual re-entry that was required when using Excel, and it gives sales associates quick access to customer history. The end result is greater insight into customer needs and expectations.

Professional and Flexible Quote Documentation

One of the major disadvantages with the Excel-generated quote document was a lack of space. The document was one-sided and did not have room for additional, relevant information beyond the quote itself. That changed with the new quote document, which is a two-sided piece with terms and conditions on the backside. Collapsible pricing is another important advantage, allowing customers to view the overall price of the product variant they are purchasing as well as specific line items. On top of all that, multiple configurations and the ability to easily track revisions allows Santinelli to provide individualized and accurate quotes to those they serve, increasing customer satisfaction and enabling their sales team to be more productive.

“The quote document was the first step on a long-term journey with Turnkey. We continue to work with Turnkey on other projects and we’re getting terrific results in improving the customer experience.”

-Bruce Moreno, IT Director, Santinelli International