

Affiliated Helps Triplefin Streamline Contact Center Operation and Support New Customer Growth with Microsoft Dynamics CRM

Introduction

Founded in 1981, Triplefin is a privately owned order-to-cash solutions provider located in Cincinnati, Ohio. The company, whose tagline is “the support behind the brand,” provides outsourced infrastructure to consumer and health care industries. Their mission is to offer superior levels of customer care, order management and fulfillment services, sales and marketing support, and billing and financial management services. In 2009, Inc. magazine ranked Triplefin as #154 out of the 500 fastest growing companies in the U.S.

The Challenge

By 2010, Triplefin’s growth had exploded off the charts, having expanded revenues from \$3 million in 2003 to more than \$120 million, mostly from acquisitions. Because of this, the company was running their Contact Center with multiple systems and databases—a challenging situation, especially when managing their contact center operation.

Triplefin had simply outgrown this process, in which they had to handle, track and manage thousands of inbound calls for their clients. In fact, the company was running 10 different CRM systems, each requiring separate training and maintenance. Making matters worse, Triplefin’s IT department often had to troubleshoot CRM issues, which was a costly and timely diversion from their core mission as an IT resource for clients.

“What we needed was a single CRM system that could keep client accounts separate and secure,” explains Linda Buken, Triplefin’s call center director. “Importantly, we also needed a system where our non-IT staff could add new clients easily and maintain those accounts, without leaning on our IT department for help.”

A ‘Fast Track’ Implementation

With a large client about to come onboard, administrators felt it was a perfect time to make a full-scale transition to a new and modern CRM system. The company was intrigued by the potential benefits of the Microsoft® Dynamics® CRM solution, but they needed an experienced Microsoft Dynamics CRM partner who understood their business needs and had the expertise to implement the solution successfully as well as train their staff.

Triplefin hired Affiliated, a leading Ohio technology and professional services company and Microsoft Partner with a Gold competency designation for CRM in the Microsoft Partner Network. They seemed a perfect fit. “Unlike other companies, Affiliated understood our third-party business, which is very complex,” explains Pamela Scherer, a Triplefin account manager. “They quickly evaluated what we needed, delivered a custom CRM implementation, and even got our new client up and running—all in a couple of months. It was an amazing turn-around.”



Challenge

Triplefin, a leading provider of outsourced order-to-cash solutions, needed to implement a CRM system that would keep client’s accounts separate and secure, while allowing new accounts to be added without reliance on in-house IT resources.

Solution

Affiliated implemented a Microsoft® Dynamics® CRM On Premise solution for call center representatives to service 10 different customers—with plans to expand the number of users to Triplefin’s IT help desk and sales/marketing department.

Benefits

Helped contact center to improve performance and accelerate reporting to customers. Provided a flexible, scalable platform to support the addition of new customer accounts by non-IT staff. Greatly reduced reliance on in-house IT services. Reduced service calls by 18% and reduced call time by 15%, delivering a more satisfying service to customers of Triplefin’s clients. Training time was also streamlined.

Key solutions and services

Microsoft® Dynamics CRM On Premise
Affiliated IT Review, Deployment,
Integration and Training Services



“Affiliated helped us change the way our contact center does business, all in a matter of months. The results have been so advantageous, we’re expanding the Microsoft Dynamics CRM solution to our own help desk system and sales/marketing department.”

Greg LaLonde, CEO, Triplefin

Initially, the Microsoft Dynamics CRM solution was set up for the staff within the Contact Center, managing 10 separate clients' accounts. However, the number of actual users is expected to double in the next six months. "Affiliated helped us change the way we do business. The results have been so advantageous, we're expanding Microsoft Dynamics CRM to our own help desk system and sales/marketing department," says Triplefin CEO, Greg LaLonde.

Scalable, Robust CRM Benefits Growth

Training new contact center service representatives, for instance, has been dramatically simplified. Rather than learning multiple systems, they have one CRM solution to master for all client accounts. This alone has greatly reduced training time, but it has also increased reporting accuracy, which has led to improved customer service.

For example, one major client requires a dozen monthly call reports, delivered by the tenth of every month. Under the new solution, staffers no longer have to check and edit every report for accuracy; instead, that once-tedious, time-consuming process is automated, while taking into account complex coding anomalies. This enables Triplefin to deliver all the reports on a much timelier basis—by the first of the month. "It gives our clients virtually real-time data to make more informed decisions more quickly—a real competitive advantage," Scherer says.

Triplefin also discovered the new CRM solution reduced service calls by 18% and reduced call time by 15%—

delivering a more satisfying service to their clients' customers. In sum, the contact center is more robust than ever, and the center's staff more productive.

Additionally, Affiliated created custom tools that now allow non-IT staff to both add and maintain new client accounts as they come onboard. As a result, Triplefin's Contact Center has dramatically reduced reliance on their IT department for CRM setup and maintenance by more than 95%. "We're a much more efficient company now, and better prepared to grow in the future," LaLonde says.

About Affiliated

Since 1993, Affiliated has been helping growing and mid-market 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, healthcare, professional services, government, and not-for-profits.

Learn more about how Affiliated can benefit your business.

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"Affiliated had been extremely responsive to all our needs. They demonstrated a grasp of our business immediately, implemented a complex solution under a tight deadline, and met our goal to reduce IT reliance in CRM by 95%. From day one, their team proved to be top of the line."

Pamela Scherer, Account Manager, Triplefin



Microsoft Partner

- Gold Customer Relationship Management
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