

Integrated CRM solution helps CodeMyIMAGE create a more efficient order process

Automation reduces delivery time, increases customer satisfaction and positions company for future growth.

To run their businesses smoothly, companies depend on integrated systems and processes that span their entire operations. When CodeMyIMAGE, a web coding services company, found itself with disconnected workflows that were affecting client satisfaction, they looked to OSF Global Services to solve the problem.

CodeMyIMAGE provides PSD to XHTML/CSS coding services to web designers, web design companies and advertising and branding agencies around the world. In addition, its developers deliver customized software implementation services that allow them to integrate their clients' CSS/HTML pages into popular e-commerce solutions and content management systems (CMS).

Automating processes and improving workflows

The success of CodeMyIMAGE's business depends on its ability to deliver high-quality markup services to its customers quickly and cost effectively. The company grew rapidly and management soon realized they had to automate many of the processes and improve workflows if they wanted to deliver quick turnaround times and improve customer services. However the tools and processes used by the various business departments were disconnected.

For example, the internal development team used a standalone project system. The accounting department used a manual system for invoicing clients. And the company website, where customers placed orders and paid their invoices, was not tied to a database where client information could be stored and accessed.

These disconnected processes and a lack of a centralized customer database meant that CodeMyIMAGE personnel could not track customer interactions, see the history of purchases for a given customer, or create marketing campaigns that targeted customers based upon their wants and needs.

In addition, communications between the different departments was handled primarily via emails. So information about a client's project, including order changes, project status and billing details, were not easily shared. This

not only caused delays in meeting customer requests but allowed errors caused by manual tasks to creep into the process.

Designing a solution

To alleviate these problems, CodeMyIMAGE wanted to implement an integrated customer relationship management (CRM) solution that would help connect its various departments and provide a single place to collect all client project data.

OSF Global Services specialists were called in to make that happen. Their plan was to customize and implement a scalable CRM solution based on Microsoft Dynamics CRM that would integrate CodeMyIMAGE's order processes with its project management activities.

Working closely with CodeMyIMAGE staff, the OSF Global Services team defined the appropriate order process workflows that matched their business requirements. In building the solution, the team created automated triggers that were aligned with specific actions that must be taken throughout the project management process. In addition, online ordering and billing components, such as the company's website order form and payment portals, were integrated with the CRM solution to ensure client data is captured properly. The team also developed an automated payment notification process and integrated it with the payment portal. This enables CodeMyIMAGE to notify clients about the status of their projects and remind them about payments.

Positioned for future growth

By automating its critical processes, CodeMyIMAGE has reduced project delivery times, improved its ability to track project details, and increased customer satisfaction. In addition, the CodeMyIMAGE team has gained efficient order management and reporting capabilities, enabling personnel to spend more time on project development and less time tracking down client information.

Eliminating the manual ordering and billing processes has also helped CodeMyIMAGE reduce the costs associated with performing these tasks. And the new project notification functionality provides clients with a regular status of their projects, helping CodeMyIMAGE build stronger relationships with its clients.

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