

Brakebush Brothers Deploys Dynamics CRM for Cost-Effective Sales Tracking & Reporting

"Working with the team at Concurrency has been a great investment for our Company. The knowledge, weekly meetings, and ease of reaching out to any of the Solution Leads on our projects has been extremely beneficial to the success of our projects. Concurrency will continue to be our business partner with all our Microsoft Solutions."

Summary

Brakebush Brothers desired a new Dynamics CRM environment, making use of out-of-the-box features to meet its needs for account management, activity tracking, and dashboards. The new environment would replace an existing CRM 2011 implementation in a way that introduced great simplicity and ease of use. Michael and his team sought an approach that would further reduce manual processes, establish workflows, accommodate additional documents types, and integrate with the company's enterprise resource planning (ERP) system.

Solution

Working closely with Brakebush Brothers' IT team, we helped establish a new, clean slate system that incorporated Microsoft best practices throughout its implementation. The goal was to develop and roll out the system in a way that would encourage its use rather than more cumbersome means of tracking sales opportunities and activities.

We worked closely with Brakebush Brothers' infrastructure administration team on the hardware side of the equation, as they spun up servers and set up DNS records for the new platform, which we designed to be on-premises but Internet facing using Active Directory Federation Services. This incorporation of ADFS allows convenient authentication of users accessing the system from anywhere.

We also supported the process of gathering business requirements to ensure that sales lead information needed from the old system would be successfully transferred and incorporated in the new environment. In this process, we helped to ensure information from the old forms could be condensed in order to keep things simple. In that same spirit of keeping everything user-friendly, we also redesigned the default form to make it easy to use.



Organization

Brakebush Brothers, Inc.
www.brakebush.com

Organization Type

Food processing.

Organization Profile

Brakebush is a family-owned, value-added food processor located in Wisconsin, with a focus on chicken products.