Enpro, Inc.

Gaining Efficiency With a New CRM System

forvis mazars

Case Study Snapshot

With the assistance of Forvis Mazars, Enpro migrated from a legacy CRM platform to a modern system with better support for its evolving needs.

The Situation

Enpro, Inc., a family-owned business since 1961, faced significant challenges with its outdated customer relationship management (CRM) system. The sales team struggled with data silos, limited mobile accessibility, and inadequate support, which hindered their efficiency.

The Solution

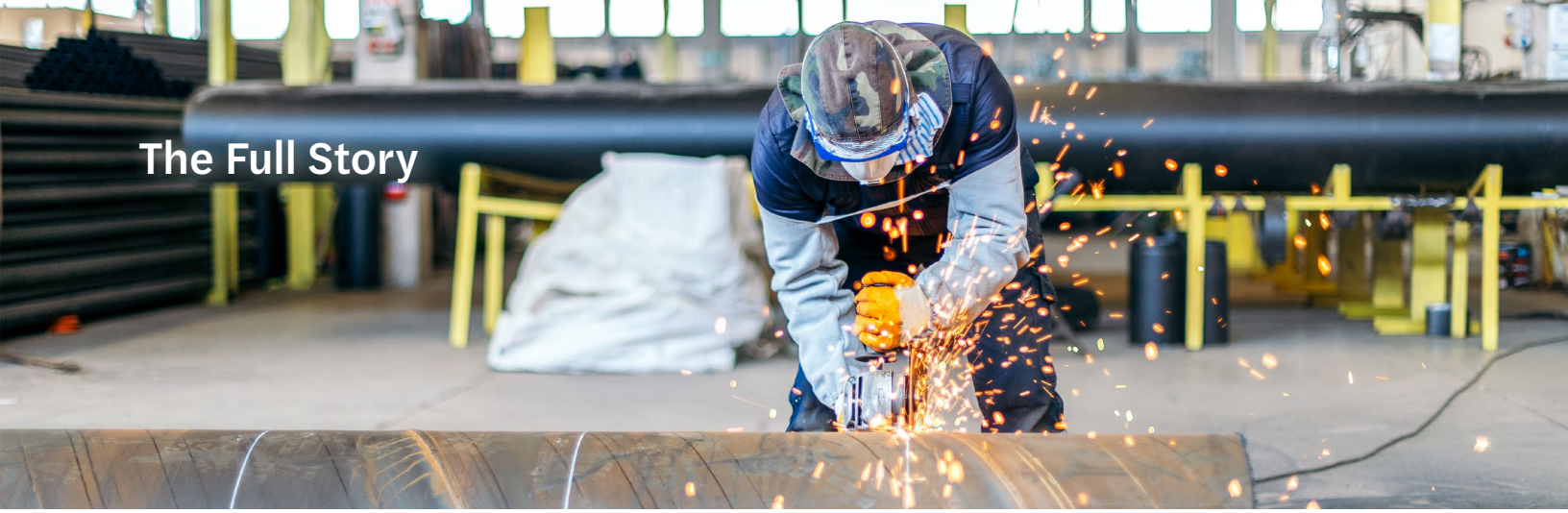
To address these challenges, Enpro decided to implement Microsoft Dynamics 365 Sales and Field Service CRM applications with assistance from Forvis Mazars. The project involved integrating the new CRM with Enpro's existing Prophet 21 (P21) enterprise resource planning (ERP) system, migrating data, and setting up workflows and system automations. The team at Forvis Mazars played a crucial role in the successful implementation.

The Benefits

The new CRM system provided Enpro with a single point of truth for company and sales data, improved mobile accessibility, and better support. The integration with P21 allowed for real-time information and visibility into inventory, enhancing the sales team's ability to support customers efficiently.

"The biggest win from the project is the increased efficiency and accessibility of documents and information. The new CRM system provided a more versatile tool and better support compared to the old system."

– Grant Cook, Enpro President



The Full Story

Enpro has helped customers solve their process problems for more than 60 years, representing leading manufacturers in separation technologies, instrumentation, and process equipment. Enpro's legacy CRM platform was no longer meeting the company's evolving needs. The aging software platform lacked a strong mobile application, which was a significant drawback. Support also was limited, making it unreliable.

The company needed assistance in installing a new CRM system to replace its outdated software, integrate it with Enpro's P21 ERP system, and incorporate contract features to create a single location for company and sales data. Enpro's sales professionals use CRM to capture notes, generate quotes, and access real-time information on their phones and laptops, making it crucial for their activities.

Enpro uses various Microsoft tools such as Power BI, Outlook, and SharePoint, which influenced the decision to migrate to Microsoft Dynamics 365 CRM applications.

Implementation & Integration

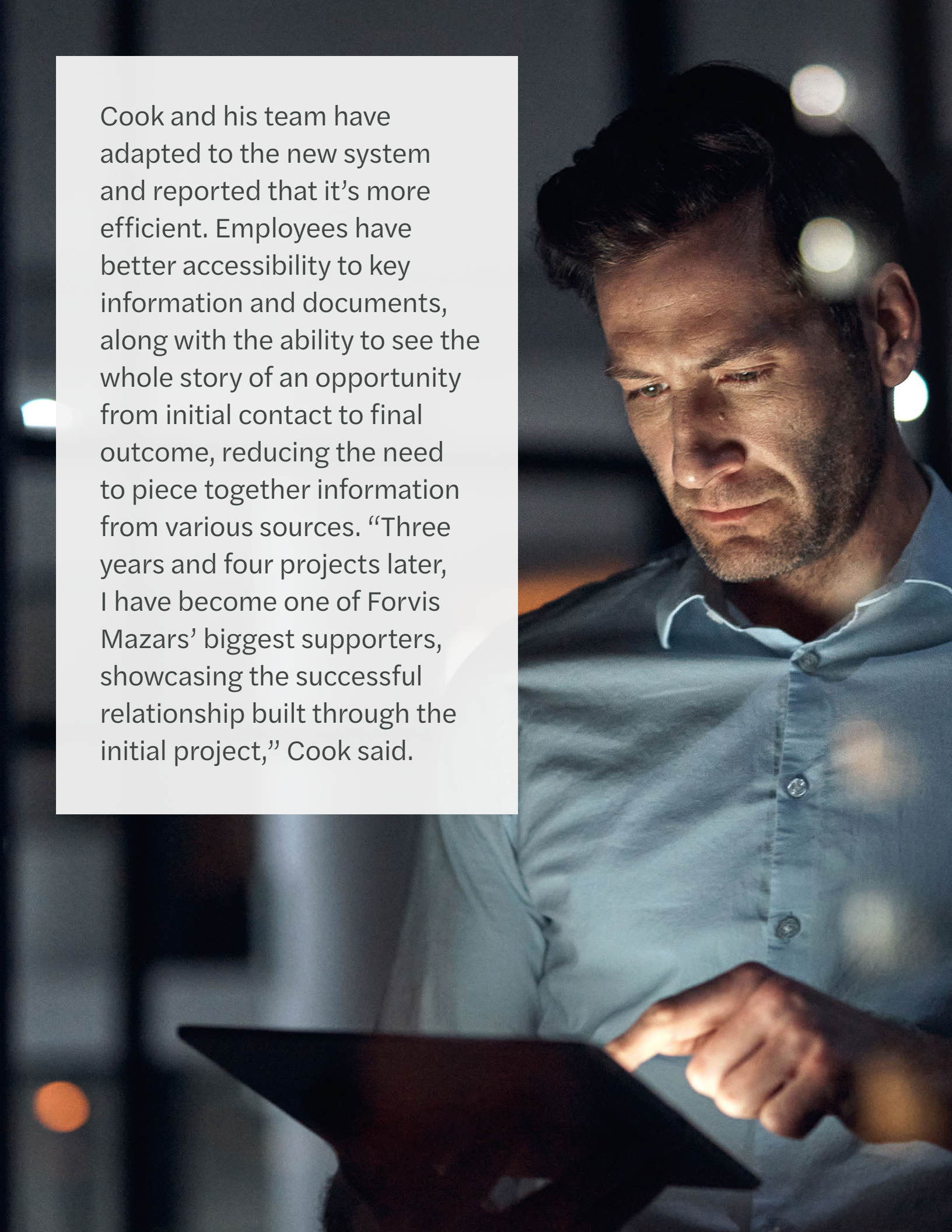
Cook was initially skeptical that the team from Forvis Mazars could handle the integration due to their unfamiliarity with P21. However, the team continued to work on the initial project and successfully demonstrated their ability with Dynamics, Outlook, and SharePoint, leading to additional CRM projects.

A key project involved dealing with cluttered data in the company's accounting system, which required creative solutions for data integration and management. The team integrated CRM with the P21 Epicor ERP system and migrated data from Epicor, which required data cleanup due to duplicate information and varying "bill to" and "ship to" addresses. Important data to be managed included accounts, contacts and titles, notes, quotes, and purchase history.

Enpro had a steady, step-by-step implementation process and worked collaboratively with the team at Forvis Mazars to introduce the new system to the sales team. The new CRM has more than 30 users, including outside sales, district managers, a vice president of sales, and company leaders who view data and pull reports.

Power BI reporting provided the sales team with real-time inventory visibility. The new CRM system also streamlined workflows by reducing the need for follow-ups with customers for details like machine specifications and installation. Enpro's one-way integration pushes data from its ERP system to the CRM, giving the sales team access to accurate inventory information. "This gives our sales team flexibility to input and retrieve various information," Cook said.

Cook and his team have adapted to the new system and reported that it's more efficient. Employees have better accessibility to key information and documents, along with the ability to see the whole story of an opportunity from initial contact to final outcome, reducing the need to piece together information from various sources. "Three years and four projects later, I have become one of Forvis Mazars' biggest supporters, showcasing the successful relationship built through the initial project," Cook said.



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