Haire Group

Transforming Operations With
Microsoft Dynamics 365 CRM

forvis mazars

Case Study Snapshot

Haire Group integrated its customer relationship management (CRM) system with Microsoft 365, helping the company to streamline its processes and improve efficiency with the removal of duplicate data.

The Situation

Haire Group, a leading provider of new and used corrugated converting machinery, faced significant challenges with its outdated database, which was 20 years old and bound to the processor. The database was failing, and the company needed to quickly transition to a new system to help ensure data accuracy.

The Solution

Haire Group implemented Microsoft Dynamics 365 Sales, integrating it with Microsoft 365, including SharePoint, to help streamline processes and improve efficiency. The native integration allowed for seamless data sharing and eliminated the need for duplicate data storage. In addition, Haire Group worked with Forvis Mazars to automate its market guide, which used to take months to compile manually.

The Benefits

Since the implementation, Haire Group has seen significant improvements in customer satisfaction. The integration with Microsoft 365 has reduced the time and effort required to manage files, improved data accuracy, and allowed sales professionals to access files directly from their devices. Haire Group's automated market guide now provides an up-to-date resource with a click of a button.

"The technology consultants at Forvis Mazars have helped our team find the possibility realm. We present them with an idea and they figure out how to use technology to automate or enhance the process."

– Michael Monroe, IT Director
Haire Group

The Full Story

Established in 1976, Haire Group is a leading provider of new and used corrugated converting machinery with more than 50 employees. The company is dedicated to understanding customer needs and offering tailored technology and machinery solutions. Haire Group's mission is to be the preferred provider of corrugated machinery solutions by offering outstanding value, continuous innovation, and exceptional customer experiences.

Haire Group had an old database on an aging version of Linux, which was 20 years old and bound to the processor, making it difficult to copy or relicense. The database was so outdated that it was essentially its own security system because no one knew how to work it, said Michael Monroe, Haire Group IT director. The company had to manually transfer and manipulate data into a new CRM system due to the old system's limitations.

The company spent a significant amount trying to extend the old system's life but knew a modern system needed to replace it. A search for alternative solutions led Haire Group to choose Microsoft Dynamics 365 for its cloud technology, data security, and data backup capabilities.

Implementation & Integration

With the help of professionals at Forvis Mazars, Haire Group experienced seamless data sharing when it integrated its CRM with Microsoft 365, eliminating the need for duplicate data storage and reducing the risk of API failures. The company uses its Microsoft Dynamics 365 CRM application with Teams, SharePoint, email on mobile, and more. The CRM system helps Haire Group store detailed customer information in one place and track purchase history, orders, and other transactions. CRM also keeps track of equipment rented or loaned to customers. The integration greatly reduced the time

and effort to manage files such as proposals, quotes, and contracts.

The change had a significant impact on Haire Group's sales team by cutting numerous steps and processes and saving them hours of work. The salespeople no longer need to request files from other departments because they now have a dashboard where they can drill through to access relevant information for their accounts. Users can tailor dashboards to focus on the metrics most important to their needs. Sales team members also can access necessary files directly from their phones or other devices.

Haire Group benefited from a custom-built CRM module called the Machine Configurator, which allows salespeople to create machine configurations with drop-down menus, helping to ensure accuracy. With the aid of Power Automate, Forvis Mazars also helped Haire Group automate its market guide, which used to involve multiple people and months-long delays. This automation has helped them save significant resources each month.

"They helped us fix outdated processes and improve business workflows. We're 100 percent with the team at Forvis Mazars," Monroe said.

The company now is exploring implementing a customer portal to streamline processes for customers—especially those running second and third shifts outside of regular business hours—by allowing them to access parts lists and submit requests online.

The Results

Implementing Microsoft Dynamics 365 Sales and its integration with Microsoft 365 have transformed Haire Group's operations, providing significant efficiency gains, cost savings, and improved data management.

Business Technology Services at Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, and managed service solutions. Our end-to-end services include technology assessments, design, implementation, upgrades, training, monitoring, and support to help clients achieve their digital transformation goals.

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