

## Axiom, Inc.

CRM System Improvements Lead to  
Improved Sales Forecasting

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## Case Study Snapshot

### Axiom, Inc. can plan better for future sales after customer relationship management (CRM) system enhancements that streamline processes for its sales support team.

#### The Situation

Axiom, Inc. is a leader in warehouse design, supply chain execution, and material storage and handling systems across the Midwest and the United States. The company wanted to improve its sales processes to enhance customer relationships and drive revenue growth efficiently.

#### The Solution

Axiom worked with Forvis Mazars to enhance its Microsoft Dynamics 365 Sales system. Changes included integrating Axiom's CRM with the Microsoft Dynamics GP accounting system, upgrading the CRM system, and working with technology consultants to create proposal templates and quoting tools.

#### The Benefits

The enhancements resulted in improved sales processes that provided better pipeline visibility and forecasting. Automated emails and better data utilization helped Axiom maintain oversight and ensure accuracy in order processing. The streamlined system and better sales management reporting led to more efficient operations and higher revenue.



“The technology consultants we’ve worked with are always responsive. They’re patient and great to work with. They get projects done efficiently.”

**Katie Nitzsche,**  
Axiom Director of Operations





## The Full Story

Axiom, Inc.—formerly known as Storage Systems Midwest—has provided warehouse design, supply chain execution, and material storage and handling systems since 1986. The company has completed thousands of single and integrated product and service projects throughout the Midwest and the United States.

The company's leadership team is focused on learning from past processes and enhancing future efficiency. Their efforts include evaluating current operations and identifying areas for improvement. The company wanted a better integration between the CRM system and GP, making sure that processes work well and data flows seamlessly between the systems. An Axiom official initiated recent CRM project enhancements to help boost forecasting accuracy.

### Implementation & Integration

The integration between the CRM system and GP allows all records—including vendor and project information—to start in CRM and flow into GP, helping data be managed efficiently and consistently across both systems. Data flows both ways between the systems, which helps provide accurate and timely information.

Axiom received support and training from technology consultants at Forvis Mazars, who helped set up workflows and automate processes in the CRM system. The CRM enhancements added new stages to the company's opportunity process, which streamlined operations for the sales support team. Expanding the stages helped the team improve the accuracy of sales forecasts.

**“The CRM enhancements have unlocked new efficiencies for our sales and service team members.”**

**Katie Nitzsche**

Axiom Director of Operations

The opportunity process initially had three stages (intro, developing, and convert/closed). A qualified stage was added to provide a more detailed description once a lead is converted into an opportunity. A “parts only” stage also was created to handle orders that only involve parts, allowing the sales team to skip the develop stage and place those orders directly.

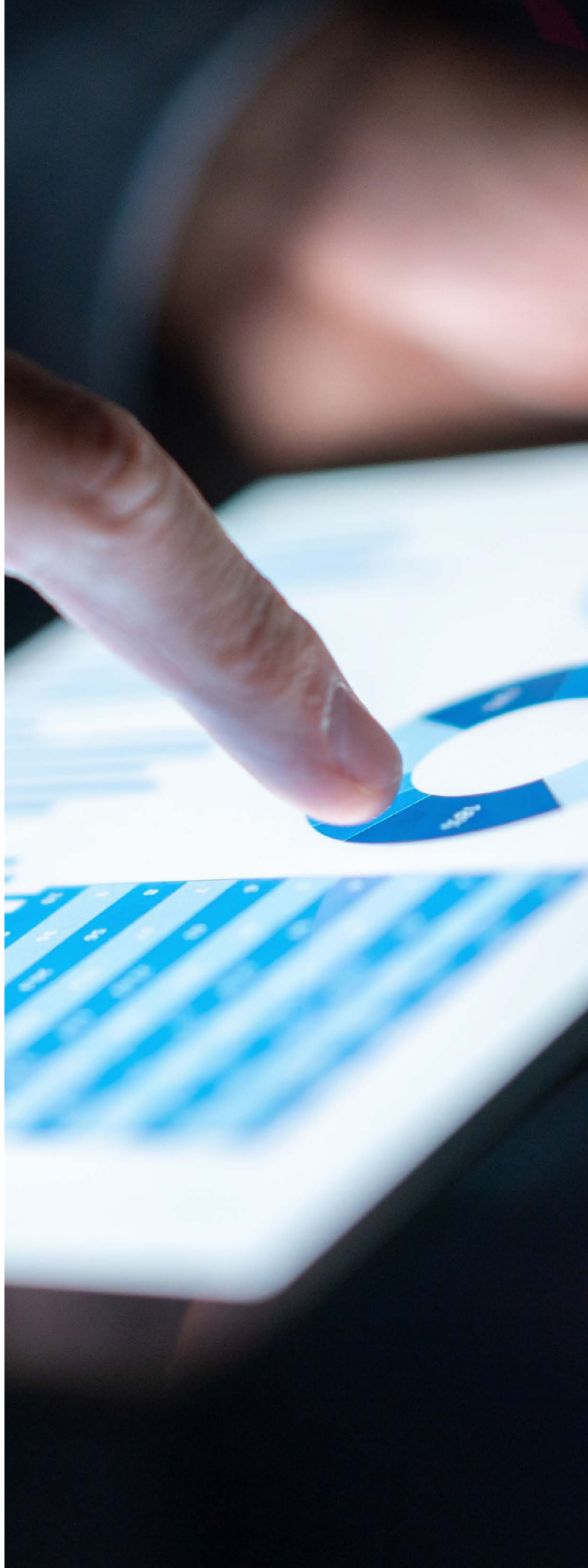
The developing stage was enhanced to feature more detailed questions regarding end-user visits, product definitions, and competition analysis. This stage aims to increase customer interaction and improve the close ratio on orders. The closed stage remained the final stage in the sales opportunity process.

To maintain oversight and accuracy in order processing, automated emails were set up in the system to help maintain efficient communication and oversight for order processing. Emails notify key stakeholders—including the president, owner, controller, and sales rep—about large orders with details such as the order amount and gross profit margin. For low-margin orders, emails go to the president or operations director for approval before the sales support team can fully process the order.

# The Full Story

## The Results

Sales forecasting and pipeline management are crucial for Axiom's leadership team. The improved system allows sales representatives to input budget amounts and probability percentages for closing orders, helping the organization effectively handle financial commitments with manufacturers and plan for future sales.



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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