

Orion Energy Is Light Years Ahead With Microsoft Dynamics and CWR Mobile CRM



A CWR Mobile CRM Case Study

About Orion Energy Systems

Orion Energy Systems is a leading provider of high-efficiency energy solutions. The company's suite of proprietary energy-efficiency technologies reduces energy consumption by 50 percent or more, without compromising operations. Since 1996, the company has saved its customers hundreds of millions of dollars in energy costs and significantly reduced their greenhouse gas emissions.

Orion's customer base includes over 100 Fortune 500 companies and ranges from cold storage facilities and aircraft hangars to grocery stores and automotive centers. To date, the company has retrofitted more than 800 million square feet with its technologies, at more than 5,000 facilities around the United States. Its high-ROI technologies deliver dramatic energy-cost savings and a significant reduction in environmental impact.

Solution

"When we looked into Dynamics CRM," said Jesse Dickert of Orion Energy Systems, "we saw we could go mobile at the same time by deploying CWR Mobile CRM." CWR Mobile CRM is the leading mobile client for Microsoft Dynamics CRM. The product leverages the power and flexibility of the Microsoft Dynamics CRM platform. It also offers the most advanced smart clients for field sales and service teams to use on their iPhone, BlackBerry or Windows Mobile devices.

CWR Mobile CRM provides Orion's mobile sales force immediate access to account and contact data as well as information on potential opportunities. It also gives them the ability to implement the company's sales process while on the road. CWR pushes follow-up tasks directly to individual sales reps, streamlining the sales process and resulting in more face time with customers. Orion sales reps previously struggled to manage high volumes

Challenges

Orion Energy Systems' strong value proposition makes it uniquely suited to capitalize on such converging market trends as the growing need for secure, low-cost energy, worries over grid reliability, and concerns over greenhouse gas emissions and environmental sustainability. As a result, interest in the company's products is rising sharply, putting a significant strain on a rapidly growing sales force.

Orion had been seeking the right CRM solution for years. It purchased and deployed a succession of products, including Salesforce.com and Sales Logic. The company even commissioned a custom in-house CRM application but found nothing sufficiently powerful to fit its needs. With the help of Ledgeview Partners, a company focusing exclusively on CRM solutions, Orion turned to Microsoft Dynamics CRM and CWR Mobility.

of data on sales leads but now access and track leads with just a few clicks on their phone.

Additionally, sales reps no longer lose valuable service or selling time with customers to managing paperwork and producing sales reports for management. Instead, CWR Mobile CRM gives Orion management immediate visibility into all sales activity. Communication between the sales force and home base is constant and immediate.

"Neal Verfueth, our CEO, is very hands-on at every level," says Girts Rubenis, in Business Development with Orion. "He wants to see what's going on at a moment's notice. He looks at opportunities, checks on the last time a customer was touched, and wants immediate communication with the sales team. From a management perspective, the CWR tool provides the greatest value by scheduling activities for our sales reps and keeping management totally up to date."

"From a management perspective, the CWR tool provides the greatest value by scheduling activities for our sales reps and keeping management totally up to date." - Girts Rubenis



Deployment

Orion sales reps began using CWR Mobile CRM as soon as they downloaded it. The intuitive nature of the tool eliminated the need for special training.

“When we looked at Dynamics CRM, we saw we could go mobile at the same time by deploying CWR Mobile CRM.” - Jesse Dickert

“The first impression when we give the tool to sales reps is that it has a lot of sex appeal,” says Keven Sprehe of Ledgerview Partners. “Their job is to make a sale. It’s hard to ask them to do back-office functions. CWR is easy to use and makes their job easier. Sales reps like that.”



About Orion Energy Systems

Orion Energy Systems Inc. (NYSE Amex: OESX) is a leading power technology enterprise that designs, manufactures and implements energy management systems, consisting primarily of high-performance, energy-efficient lighting systems, controls and related services for commercial and industrial customers without compromising their quantity or quality of light. For more information, visit www.oesx.com.

CWR Mobile CRM’s multi-platform functionality made Orion’s transition to mobile devices seamless. Unlike web-based products, CWR’s tool is built to take advantage the native user experience of each mobile platform, providing a familiar and comfortable experience to every member of the sales force, whether they use iPhone, BlackBerry, Windows Mobile or another device. CWR also provides full offline capabilities, so users can complete sales and service tasks with their CRM system anywhere, anytime – even deep in a factory or on a plane when they have no data connectivity.

“One of the requirements that led us to CWR Mobility as the premier choice was its ability to run on multiple platforms,” adds Sprehe. “The field teams can interact with it within five minutes, because the experience is so familiar for each device.”

Orion Energy Systems follows the philosophy espoused by CEO Verfuert that sales is about making a promise and keeping it. CWR Mobility CRM helps management and sales reps alike know instantly what they need to do to satisfy a customer.

Whether in improved lighting, reduced greenhouse gas emissions, or lowered operating costs for its customers, Orion Energy Systems has built a business around



“I’m amazed at the development of this technology,” says Girts. “Our sales process hasn’t fundamentally changed, but CWR Mobile CRM really makes it much more efficient and friendlier for everyone involved. It’s an incredibly powerful tool.”

efficiency. Armed with the powerful functionality of CWR Mobile CRM, the company’s sales reps are becoming as efficient as the products they sell. They too, like their business, are “Light Years Ahead.”®

About CWR Mobility and CWR Mobile CRM

CWR Mobility is an independent software vendor specializing in the development, marketing and support of vertical solutions, add-on products, enhancements and development tools built on the Microsoft CRM platform. CWR Mobile CRM leverages the power of the Microsoft Dynamics CRM system and the advanced connectivity of the Windows Mobile, Apple iPhone and RIM BlackBerry platforms, enabling rapid deployment of Microsoft Dynamics CRM to users with wireless handheld devices. For more information, visit www.cwrmobility.com.

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