

CUSTOMER CASE STUDY

Orion Energy is light years ahead with  
Microsoft Dynamics®CRM and CWR Mobile CRM



**SOMETIMES IT TAKES THE RIGHT PARTNER TO MAKE THE DIFFERENCE AND MOVE YOUR ORGANIZATION FORWARD. THE RIGHT PARTNER WILL LOOK AT YOUR NEEDS, SURVEY THE MARKETPLACE, AND BRING IN OTHERS TO MEET THOSE NEEDS. LEDGEVIEW PARTNERS DID JUST THAT FOR ORION ENERGY SYSTEMS WHEN THEY EXPRESSED A NEED FOR A MOBILE CRM TO WORK WITH THEIR DISTRIBUTED, ON-THE-GO WORKFORCE.**

**SITUATION**

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 Mobile CRM.

**SOLUTION**

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, iPad, BlackBerry, Android 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 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 has given Orion management an immediate visibility into all sales activity. Communication between the sales force and home base is constant and immediate.

**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, Business Development*



**I'M AMAZED AT THE DEVELOPMENT OF THIS TECHNOLOGY. 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.** *Girts Rubenis, Business Development*

"Neal Verfuert, 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."

#### 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.

"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."

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, iPad, BlackBerry, Android or Windows Mobile devices. 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 it's improved lighting, reduced greenhouse gas emissions, or lowered operating costs for its customers, Orion Energy Systems has built a business around 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."

#### ORION ENERGY SYSTEMS OVERVIEW

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.

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**INDUSTRY**  
Energy

**YEARS IN BUSINESS**  
15

**COMPANY SIZE**  
260

#### 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, iPad, RIM BlackBerry and Android platforms, enabling rapid deployment of Microsoft Dynamics®CRM to users with wireless hand-held devices.

[www.cwrmobility.com](http://www.cwrmobility.com)

#### LEDGEVIEW PARTNERS, LLC

At Ledgerview Partners, we work closely with your business to implement breakthrough performance improvements that drive extraordinary added value in your customer relationships. We provide your company with a holistic, end-to-end approach to customer relationship management through our sales and customer care professionals, and our expertise in Microsoft Dynamics®CRM.

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