



{ a method:CRM success story }



## Overview

The partners of the renowned guitar string manufacturer Dean Markley recognized their current business practices required reorganization in order to keep up with demand and to maintain high levels of customer service. Partner John Weaver put his trust in Method:CRM for its customizable features and QuickBooks integration. Since partnering with Method:CRM, the Dean Markley team has:

- Reduced daily cash collections task from 4 hours to 5 minutes
- Improved work order process from 11 involved employees to 1
- Improved customer service through customized safeguards

## The Challenge

2012 presented the Dean Markley partners with a problem most business owners wish for: too much demand for their product. But John Weaver's team was processing thousands of orders to distributors, retailers, and individual musicians via fax machines and a legacy system. There were consistent concerns with the company's ordering processes, causing issues that rippled throughout the team. "Only a few years ago," John recalled, "we were on Dot Matrix, where there were no spreadsheets, and everything was being input multiple times. Orders touched 11 different hands and we were inputting the order 3 or 4 times."

### Disorganized Sales Order Processes

Between printed fax orders and overly complicated communication practices with the factory, orders were falling through the cracks. On more than one occasion, John's team would receive a call from a frustrated client inquiring into an order that had been placed weeks before. The company's sales process involved numerous employees, the Dean Markley factory, and various shipping vendors, which resulted in numerous missed orders with no way to pinpoint where the order was lost.

### Overly Manual Operations Practices

The company's operations department also struggled with overly manual and time-consuming processes. A member of Dean Markley's C-level management was spending countless hours managing the company's finances, which kept her busy, but certainly not productive. This lack of process automation meant she was forced to create and memorize her own practices - this case-by-case approach was crippling her ability to delegate tasks.

John knew Dean Markley's team required a complete procedural overhaul for the company to move forward, but past experiences with enterprise CRM/ERP software left John skeptical of CRM solutions for SMBs. "I know how bad some CRMs can be - I was a senior officer with a major insurance company and was horrified with the CRM that was being implemented when I was there. It was too much *'here's what it's going to be'* and *'this is the only way it's gonna be'* -- they spent 50 million on a system that still today is not being utilized."

## The Solution - Method:CRM Pro

John knew the best solution for Dean Markley would need to be customizable and integrate with the company's cloud-based accounting software, so both sales and operations could be managed in one space.

"A huge benefit of choosing Method:CRM was that it worked with our QuickBooks Online. But after doing a demo, it would have been the one we chose anyway because of the customization features. We did the math and realized that even if we invested a full year into customizing Method, it would still be a far better value than going with one of the other companies that have a huge upfront cost."

### Sales Orders & Customer Info Entered Once

Prior to using Method, completing a sales order at Dean Markley was a multiple person, data entry whirlwind. Now, custom order form screens - built by a **dedicated Method consultant** - act as a catchall for the sales workflow. When orders arrive, or when quotes are sent out, John's team enters everything into the order form screen, which triggers pricing approvals, factory correspondence, and invoices to customers. The custom order form screens speed up

the company's sales and distribution process while also providing management with built-in safeguards.

"Before, an order touched 11 different hands, but now we create one order and the necessary information is generated and sent to all the right people," John explained. "A salesperson can input an order, but only one person can send it out. We put these safeguards in place to make sure that consistent discounting was being offered throughout Dean Markley."

### Improved Customer Service with Custom Reports Screens

To improve customer service, John worked with Method to create another safeguard in the form of a report screen. "Our other safeguard that is working really well for us is the Ship Report. Instead of going through thousands of invoices on Monday, we can view the Ship Report to see if an order has been in for more than 7 days. If there are any, we can immediately communicate with the factory to see why this is the case. These reports and safeguards allow us to prevent bad customer experience before it occurs" John explained.

### Cash Collections Now Done in Minutes

With the sales workflow improved, John and his Method consultant put focus on improving the company's operations practices, so staff were not forced to spend 3-4 hours a day rifling through pages of collections. To relieve a C-level manager from tedious, admin level tasks, Method customized a screen that would give John's team greater visibility into the company's cash collections. And because Method:CRM syncs with Dean Markley's QuickBooks file, the consultant was able to customize a screen that provides insight into the company's financials in real-time.

"We can now look through a simple graphic and the corresponding list to see what has been collected this week, what is still out there, what's going to happen over the next couple of weeks. It gives our CEO the ability to forecast just by looking at that graphic - 4 hours of work has gone down to 5 minutes."

## Business Benefits

Since deploying Method:CRM, Dean Markley has improved sales and operations efficiencies and eliminated its reliance on paper processes. The use of Method:CRM has freed up countless hours that are now dedicated to increasing Dean Markley's share of the guitar string market.

"Method is helping us to get into more stores and to get more consumers now, because we can operate better and consistently. We know that every single step we take with Method makes our operating procedures easier and it makes being measurable and trackable easier. When I use Method I feel like I actually might be able to take a vacation in 2014."

Additionally, custom Method screens and automated processes have allowed the Dean Markley partners to better allocate tasks and organize the company's staff with confidence.

"Method is allowing us to transfer knowledge at a much easier rate by having everything in an easy format so we don't spend countless hours training. We've taken the thinking out of processes because Method is doing it for us, and you only get that with customization. Our CEO has a high standard and an integrity level - she can't relieve a task to someone until she knows that it's going to be right -- it's not just an improvement of her time, it's the ability to transfer responsibilities and delegate."

Now, when John and his team recognize an opportunity to improve a business practice, they know the solution is just a phone call away.

"I've told our Method consultant 'I have a 14 hour project ahead of me, but if I can get this piece of customization done in the next day, it would take me less than 30 minutes.' and he got it back to me in that period of time. He saved me an entire weekend 2 or 3 different times," John recalled.

"The customization of Method:CRM and being able to work with the kind of people who hear what we want, understand what we want, and be able to reproduce that is what makes it feel like it's our own personal system. It makes us a better organization. Every single step we take with Method we get a little bit better because it reverberates throughout the entire operations. It's not just a typical CRM, this has transformed the way we do business."

## About Dean Markley

In the 1970s Dean Markley started out as a music store owner who began to experimenting with guitar strings. The successful experiments gave birth to **Dean Markley USA**, a company that would grow to become a world renowned manufacturer of instrument strings, amplifiers, and pedals.

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