

Customer Dynamics

“The CRM system we’d been using was stand alone – where managers weren’t linked in and couldn’t see what was going on with the sales force. Microsoft Dynamics CRM brought it all together – and Customer Dynamics made it happen.”

- Ben Larisch
Technology Director



Tetra Financial Group

Provider of financing services for companies with leased assets and capital equipment

Tetra Financial Group provides financing for leased assets and equipment for more than a score of industries, helping companies to engineer expansions of operations and capacity in order to grow their businesses. The Salt Lake City-based firm serves companies across the United States, often providing critical capital when other firms cannot. One of the strengths of its business model is the broad scope of industries and assets it is willing to back, from new computer systems to sustain vibrant growth of young companies to construction equipment and materials.

Customers include a government research laboratory, which received over \$1 million for production and manufacturing equipment; a major health care provider that received \$1.6 million for lease financing for advanced x-ray equipment; a global pharmaceutical company that received \$2.7 million for workstations, PCs and printing equipment; and a global financial services company that received \$17+ million for new bank processing equipment.

At a Glance

Company

Tetra Financial Group
3165 East Millrock Dr. #400
Salt Lake City, UT 84121

Website

www.tetrafg.com

Number of Employees

50

Products and Services

Provider of asset and equipment lease financing.

Target Market

Multiple industries, from aerospace and automotive to mining and machined parts manufacturing, health care, government, and energy, among others.

Applications Used

Microsoft Dynamics CRM



“We finance a lot of different kinds of equipment – often when customers can’t secure financing anywhere else,” says Ben Larisch, technology director. “A lot of firms are geared to only one type of equipment, but we’re more broad spectrum and are able to finance almost any corporate project.”

Tetra Financial Group managers develop leads they obtain from Dun & Bradstreet listings for assignment to individual sales team members to follow up on. The company had long used a leading standalone contact management system, but managers were totally dependent upon paper reports in efforts to keep track of the status of leads and the efforts of individual sales team members in bringing them to close.

“Before, all our notes were scattered throughout the system. Microsoft Dynamics CRM provides one central repository for information, maintaining critical data all in one place. Our managers are able to quickly review notes, evaluate where each salesman is with regards to every lead, and oversee the overall process in a much more efficient manner”

The lack of integration resulted in proliferation of paper, the need for a plethora of various reports, and endless question about what information was the most current and accurate.

“We looked at a number of CRM packages, but in the end Microsoft Dynamics CRM made the most sense,” Larisch says. The company had already standardized on Microsoft Office, which made the integration of the CRM package with Outlook straightforward and transparent.

Implementation was “fairly simple,” Larisch states. Larisch worked closely with the professional staff from Customer Dynamics,

the Microsoft Dynamics CRM value-added reseller located in Salt Lake City, to configure the process workflows and how the Microsoft software would support them.

“Ryan Redmond at Customer Dynamics has very broad expertise and knowledge in the sales process, in CRM, and in business in general. He was able to assist us in fine-tuning our sales process and in learning how best to take advantage of the software.” In addition, Customer Dynamics engineered critical customizations in support of the streamlined process. Overall implementation went smoothly and without delays.

“They also conducted system training with our sales staff,” Larisch says. The transition to the new system was completed in late fall 2008.

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“Customer Dynamics really helped us in optimizing our sales process and in the management of it. Managers have better visibility of the entire process and can focus their efforts more effectively in providing assistance when and where it is needed.”

“The system is working well for us,” Larisch states. “We’re excited to continue to evolve in using Microsoft Dynamics CRM to manage our business. It’s made us considerably more efficient in the entire process of providing critical financing to our customers.”



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