

# Wipfli Connect

FOR MANUFACTURERS

**CRM** that works the way you do.

**Wipfli Connect for Manufacturing is a unique and powerful customer life cycle tool.**

**But it's also much more than that.**

Built on Microsoft Dynamics® CRM, it's a solution tailored to the manufacturing industry. And it's made to work the way you already work.



**Wipfli Connect for Manufacturing creates one simple-to-use interface across your entire enterprise, allowing you to effectively manage vital information on your dealer and distribution channels, customers, products under warranty, and claims. It keeps your entire organization up to date on every customer and product life cycle, letting you improve customer satisfaction and achieve service excellence.**

**Enhance customer service.**

Comprehensive information on every customer is in one central, easily accessible place, helping you deliver efficient, personalized service with every interaction.

**Increase service profitability.** Track service eligibility, manage warranties, and automate preventative maintenance schedules with complete enterprise visibility.

**Streamline communication flow.**

Better manage your sales channels, leads, opportunities, and service delivery, whether you sell direct, rely on dealers and distributors, or contract service work.

**Improve processes and gain efficiencies.** Using one central source of customer and product warranty information lets you improve workflow, automate tasks, eliminate duplicate data entry, and prevent redundant or overlooked service delivery.

**WIPFLI**<sup>LLP</sup>  
CPAs and Consultants

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



## Manage resources with greater efficiency and put more flow in your workflow

Wipfli Connect for Manufacturing turns data into actionable information and gives you—and everyone in your organization—a clear view of accurate and comprehensive customer and product information across all channels.

It uses Microsoft Dynamics® CRM as a platform while working seamlessly with Microsoft Outlook® to build on business applications you're already familiar with. It lowers the learning curve and gives your organization a familiar platform to grow your business.

### Wipfli Connect for Manufacturing gets everyone on the same customer service page to ensure the efficiencies you need now and throughout the life cycle.

- Link customer information, service contracts, product warranties, and sales records to centrally manage customer interactions and put that information in the hands of those who need it, when they need it.
- Track products after the sale and manage them more profitably throughout the life cycle.
- Ensure better sales channel management and integrate sales and marketing campaigns for greater effectiveness.
- Improve service delivery processes and worker productivity, manage change/service orders, and streamline workflow.
- Provide visibility and real-time information to empower a mobile work force.
- Get early insights into product quality and profitability to address them quickly.

## Improve after-the-sale service management

Wipfli Connect for Manufacturing improves warranty and claims management and maximizes your service profitability. It lets you track service and warranty activity no matter how complex the products, parts, or service promises. As a result, you schedule maintenance and repair and provide support services with greater efficiencies. Through automated processes and by providing service workers with real-time access to customer data, you increase employee productivity, enhance customer satisfaction, and reduce costs.

## Manage sales staff, dealer networks, and distribution channels with ease

Provide your sales channels with accurate, up-to-the-minute customer information to help capture leads, drive performance, and improve your competitiveness. That includes making product configurations, costs, and pricing information accessible from anywhere to help your salespeople cross-sell and up-sell. Wipfli Connect for Manufacturing also lets you establish collaborative or self-service portals to strengthen communications with dealer networks and distribution channels.

*Comprehensive. Collaborative. Sales and Service. That's Wipfli Connect for Manufacturing.*



**Microsoft Partner**

Gold Customer Relationship Management

For more information about Wipfli Connect for Manufacturing, visit

[www.wipfli.com/wipfliconnect](http://www.wipfli.com/wipfliconnect)

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