Forecast 3D

FORECAST3D
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Enterprise-grade 3D Printing

Forecast 3D Partners with FMT Consultants to Implement Cutting-Edge, Cross-Platform Functionality using Microsoft Dynamics CRM

Forecast 3D, headquartered in Carlsbad, California, has specialized in enterprise-grade 3D printing since 1994. Some of the most innovative, cutting-edge companies in the world partner with Forecast 3D for help in turning their abstract ideas into tangible, 3D prototypes and production components. Forecast 3D has forged ongoing relationships with companies such as Tesla Motors to 3D print the prototype for the new Model X sport utility vehicle, and is volunteering as part of the e-NABLE collaborative to inexpensively produce and donate a "raptor hand" prosthetic device to injured children in Haiti and other third-world countries.

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> -DONOVAN WEBER
> *COO & Co-Founder, Forecast 3D*

CROSS-PLATFORM FUNCTIONALITY

Forecast 3D built an ERP solution from the ground up called Forecast Pro and integrated the software with its website, so that customers could set up an account and upload specifications and supporting documents to get a quote. While Forecast Pro was meeting Forecast 3D's production needs, the company still lacked a CRM solution for effectively managing sales and marketing activities.

Donovan Weber, COO and co-founder of Forecast 3D, knew that Microsoft Dynamics CRM 2011 would be robust enough to manage the company's front-end needs, but writing custom executables in Dynamics CRM and implementing them cleanly across a .NET platform is not an easy task. He wasn't sure it could be done in accordance with his distinct vision.

As Weber says, "I needed someone to help me integrate my home-grown .NET, SQL-based ERP system with Microsoft Dynamics CRM."
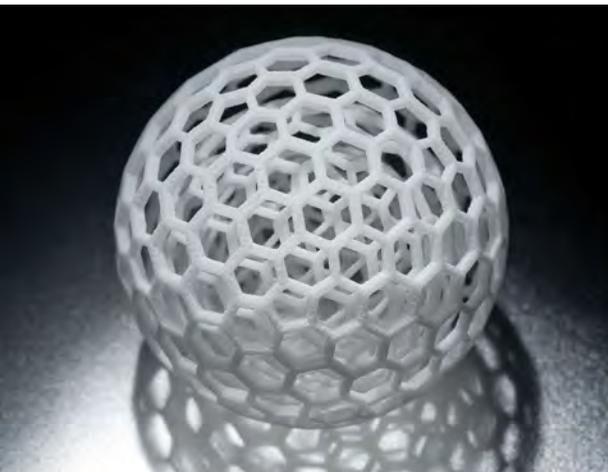
FORECAST 3D

- In the business of 3D printing for over 20 years.
- Over 80 employees with 12 new hires in the last year.
- Recently added 5,500 square feet to its warehouse for a total of 42,500 square feet of printing space.
- Featured on Discovery's "Prototype This" series.
- Ranked No. 8 on Plastics News' list of Best Places to Work in the Plastics Industry in the US and Canada.

CHALLENGES

- Sales, Production and Marketing needed a place for managing leads and tracking customer interactions.
- End users needed to view recent order history and data from Forecast Pro in CRM.
- Sales management wanted accountability measures to keep track of sales goals.
- Marketing needed tools for managing email campaigns and assigning leads.
- The CRM system needed to be accessible from any mobile device.

RESULTS

- FMT imported accounts and contacts from Forecast Pro to Microsoft Dynamics CRM 2011.
- Imported contacts, comments, notes from Outlook into CRM. Users can link Outlook info back to CRM.
- New contacts from CRM feed automatically into Forecast Pro.
- Snapshot feature in CRM links to an iframe providing recent quote for contact from Forecast Pro.
- CRM grabs data from Forecast Pro and outputs sales reports on custom CRM dashboard.
- ClickDimensions plug-in allows targeted email campaigns for marketing.
- Upgraded from Microsoft Dynamics CRM 2011 to CRM 2013.

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CROSS-TEAM EFFORT

Forecast 3D reached out to the Dynamics CRM experts at FMT Consultants. As Weber recalls, "FMT came right in, hit the ground running and met our .NET developer, PHP developer and IT person right at their level. FMT understood our IT structure and executed things very professionally."

FMT worked with the Forecast 3D technical team to fully understand the company's need for database cross-table referencing. FMT configured Dynamics CRM to grab data from the Forecast Pro database in order to generate sales reports. Weber wanted dashboards for viewing a salesperson's progress with each of Forecast 3D's services, so FMT designed a user-friendly interface that mimicked a car's dashboard, right down to the gauges.

The real challenge lay in viewing recent sales activity in CRM, as this information is gathered through the website or entered straight into Forecast Pro. FMT designed a snapshot feature, whereby the contact record in CRM contains a hyper-link that opens an iframe from Forecast Pro showing that contact's last quote. Weber says, "It's slick and it works."

As a needed feature for the marketing department, FMT installed ClickDimensions, a marketing automation suite developed specifically for Dynamics CRM, so that the marketing team can use the CRM database for targeted email campaigns.

Each lead is now categorized based on end-user set parameters ranging from "cold" to "hot." Marketing and sales are able to focus on qualified leads for their messaging and sales efforts.

CUTTING-EDGE SOLUTION

Custom and customized can work together, but it's not simple. FMT and Forecast 3D teamed up to do something novel, and it worked.

Forecast 3D now has a customized Microsoft Dynamics CRM solution for its sales and marketing that works with their own homegrown custom application, Forecast Pro. Sales, Marketing and Production all have access to the same integrated information and can now do a much better job of reaching out to customers as well as manage their own internal communications.

While FMT was still working with Forecast 3D on CRM 2011, Microsoft released Dynamics CRM 2013. Weber was interested in the enhanced functionality, but more importantly, saw the need for quick adoption so the sales team wouldn't have to be retrained on the new user interface should Forecast 3D decide to upgrade to 2013 later on. FMT quickly and successfully upgraded Forecast 3D to CRM 2013 without compromising any customizations.

As Donovan Weber attests, "FMT did a great job of implementing my vision. Our sales people now have easy access to all their customer data and it feeds directly into Forecast Pro. This is high-level cross platform functionality. I'm confident that we are operating at the leading edge of CRM capability."