Actionable intelligence at a glance.

How MondoCRM was able to bring data visualization to a commercial & industrial coatings company for better and more timely decisioning.

A CASE STUDY

Cross-platform data expertise and a deep understanding of business processes enabled MondoCRM to help an industrial coatings company bring their key performance indicators (KPI's) to their fingertips for improved bottom-line results.

Orion Industries is proud to offer coating services to customers around the globe!

MONDOCRM

We facilitate insight.

Executive Summary

MondoCRM knows that data is virtually useless until it is aligned with company objectives and processes.

We brought data visualization to management for better decisioning among and between teams.

- ✓ Analyzed business processes and identified key data points for tracking
- ✓ Implemented opportunity tracking
- ✓ Broke down data silos for clearer enterprise view
- ✓ Built a real-time dashboard for KPI's

The Challenge

An *Act!* user since 1998, Orion Industries was experiencing bottlenecks with their reporting. Sales assistants had to maintain 4 *Excel* files, deal with a crazy amount of data re-entry, *Act!'s* process wasn't automatically updating and they weren't able to track opportunities. As a result, Orion was relegated to multiple disparate processes. There were even more data silos elsewhere in the organization.

The Solution

We helped them clean up their data and better organize it. MondoCRM analyzed their *Act!* database, Orion's battery of reports, and how they were created. Subsequently, we aligned them with company workflows. We reviewed all software involved, observed redundancies and concluded that *Act!* required some redesign before we could align it with their reporting process.

Once preliminary analysis was complete, we then built a data visualization platform with *Microsoft Power BI* for reporting so management can track their KPI's—both in detail and summary—at a glance.

The Impact

Orion's new configuration makes for better, more timely decisioning. They also are able to achieve deeper insight into company performance. Redundancies were eliminated. Fewer silos, spreadsheets and consolidated data points allow for easier communication between departments and more efficient collaboration. Everything works better when everyone is on the same page.

All data is consolidated within *Act!* Orion's sales assistant isn't wasting time with repetitive data entry and everyone enjoys consolidated, single-step reporting. Managers and sales reps alike get deeper pipeline intelligence at a glance.

Trend analysis opens up a whole new level of insight into Orion's modeling, planning and management.

The Client Quote

"Thanks for saving me a half-day per week with redundant data entry, and it's easier to look at all the data at once with Power BI."

The Key Takeaways

1. Mondo knows business process mapping and refinement.
2. Measure what matters.
3. Thoughtful data approaches provide real cost savings.
4. We help our clients get the most from what they have. You don't always have to change entire CRM systems to get features it might lack out of the box. We leverage free software to help achieve more bang for the buck whenever we can.

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738 E. Dundee Rd. #214
Palatine, IL 60074
(312) 527-3133
mark@mondocrm.com
www.mondocrm.com