



Kennametal refocuses on clients with Microsoft Dynamics 365

Kennametal, a leading material science and manufacturing company, found their aging systems left the sales team over-stretched to service growing customer demand. To free up the sales team to spend more time in front of customers, Kennametal VP and CIO Steven Hanna went in search of new technology to help the sales team get ahead of client needs. Hanna chose Microsoft Dynamics 365 for Sales and Office 365, and the organization is anticipating a fast and significant return on investment.

While big industries were hurt by the global economic downturn, the companies that serviced those industries were hit even harder. Kennametal was left suffering from a reduction in staff. To add to the challenge, the organization had outgrown their marketing and sales systems, which made processes, tracking, and reporting difficult and labor-intensive. An internal analysis of the remaining sales team found that nearly 30% of their time was spent performing manual administrative tasks. Kennametal VP and CIO Steven Hanna knew that new enterprise systems could provide the efficiencies they needed.

New systems fill gaps and automate processes, instilling agility

Kennametal's homegrown sales tools just weren't keeping up, and the company needed an updated centralized sales funnel and subsequent tracking system to better manage leads through to sale, and a single system to automate and track marketing campaigns through to orders for better visibility into ROI. In all, these tools would provide a much-needed 360 degree view of the customer for automated sales reporting, which was key to executive-level decision making. But the biggest gain Hanna saw was in automating processes that would free up the sales team to focus on their customers. He anticipated this would create a cultural shift that could reap big rewards, very quickly.

“The key to Kennametal’s continued growth will be ingraining a customer-focus into our culture. The right technology is critical to cutting out busywork, which frees up our salesforce to spend more time in front of customers doing what they do best,” adds Hanna. “Today’s technology can automate nearly all of the work traditionally done at the sales-desk. This would help us accelerate the business, moving ahead with a focus on the customer.”

Ambitious thinking becomes comprehensive plan

Hanna and his team began searching for a single platform solution. “We didn’t have one need – we had a hundred. One single system just wasn’t going to cut it. We needed a comprehensive ecosystem that worked together seamlessly,” says Hanna. “The Microsoft platform provided a complete solution, setting the stage for comprehensive customer engagement.”

Hanna started by updating Kennametal’s productivity software from Lotus Notes to Office 365, then they paired Office 365 with SharePoint. “Our people are loving the increased functionality; they can do more, more easily.” Skype for Business (formerly Lync) was then brought in to replace Kennametal’s aging telephony systems, enabling call center engineers to engage with customers from anywhere. “Calls can be distributed among everyone working from home on Skype and customers have faster access to the right expertise,” explains Hanna. This work-from-anywhere flexibility proved popular with recent retirees, allowing Kennametal to retain their specialized knowledge on a part-time basis. Encouraged by these results, Kennametal then implemented Skype to streamline reviews with customers. “Work isn’t a place you go, it’s a thing you do.” Adds Hanna.

After deploying the initial Microsoft productivity solutions, Kennametal is leveraging the Dynamics 365 thought leadership of their partner eLogic to deliver on Kennametal’s philosophy of customer-first experiences, building long-term relationships while simultaneously driving organizational efficiency.

News alerts keep sales teams more connected with customers

Hanna plans to utilize Dynamics 365 to send alerts to each member of the marketing team when their customers appear in online news stories. This will allow the Kennametal sales team to be first on the scene when customers strike a new deal, and keep them apprised of the competitive landscape in order to generate new leads. Dynamics 365 scans the headlines, aggregating client-specific content from sources such as The Wall Street Journal, Twitter, and NPR into newsfeeds. These timely stories provide key jumping-off points for sales discussions, helping the sales team close opportunities.

Knowledge base saves valuable tribal knowledge

Hanna also envisions using Microsoft SharePoint and the cloud as a centralized repository to connect a global staff with a store of irreplaceable industry knowledge. “We’re going to set up a video channel for every function in every group. As people retire, they’ll use Skype to capture their knowledge and experience to show new employees. This won’t be some off-the-shelf, theoretical training. It will show people exactly how to do something.”

Easier sales reporting offers large-scale agility

Sales reports that once took sales staff hours to cobble together now can be easily generated using the reporting tools inside Dynamics 365 for Customer Service. With Microsoft Power BI, visual reporting helps surface spikes and trends which provide insight into profitability and allow for detailed drilling-down to the customer-detail level. Report generation is simple, easy, and can be automated to provide regular updates on how the company is performing against projections. Best of all, anyone can access these tools across the organization, at any time.

Automated marketing integrates with sales

“Our marketing team can’t wait to utilize the integrated solutions in Dynamics 365. They’re looking to deliver personalized campaigns across all channels – digital, social, and traditional – and then measure their results to determine ROI, all with Dynamics 365” says Hanna. Dynamics 365 also provides the ability to intelligently segment customers, creating targeted audiences for their campaigns which fill the sales funnel with opportunities. The sales and marketing teams are better connected with one version of the truth, and a consistent message for customers means better customer engagement across the board.

Automation eliminates busywork and the cloud increases collaboration

“By automating many of our systems Dynamics 365 can help reduce our administrative time by 15-20% freeing up our sales staff to spend far more time in front of customers,” says Hanna. Instead of typing up meeting notes, employees can dictate them on their Surface devices through OneNote, then store the recordings in SharePoint. Outlook will recognize and add any action items to the employee’s Outlook calendar. It can create reminders, notifying the employee when it’s time to place a follow-up call, or check the progress of engineering. With Skype, the sales team is interconnected with each other, customers, engineers, and vendors for fast answers critical to a sale, and with Dynamics 365, all detailed client information is shared for access by anyone at any time.

Embracing change accelerates the business

“With our old technology, getting new capabilities took forever - you got a new release every three years. It would then take you nearly four years to deploy the new technology.” says Hanna. “With Office 365 and the Dynamics 365, we’re in the cloud and see a steady stream of improvements every month.”

Hanna predicts that this dependable, fast-paced routine will help his people embrace change. “Instead of fearing the next big change where they’ll have to learn all new patterns, they’ll actually look forward to what’s coming next. With Dynamics 365 for



Customer Service, going to the cloud enables not just the technology, but also an optimistic mind-set.”

“Work isn’t a place you go, it’s a thing you do. “

- Steven Hanna: VP and CIO
Kennametal Inc.

