

## Southern California Material Handling

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



### Challenges

- Using multiple systems created inefficiencies and increased expenses
- Setting up ongoing campaigns was too time-consuming
- Difficult to analyze, track and report on results

### Solution

- Implementing Microsoft Dynamics 365 with ClickDimensions marketing automation natively built inside of the CRM solution
- Setting up campaign automations to take over inefficient email marketing processes for sales team campaigns
- Replacing existing event and survey systems with ClickDimensions all-in-one functionality

### Benefits

- A 50% reduction in the amount of time spent on setting up routine email campaigns
- Integrated CRM and marketing automation functionality allowed for better customer segmentation and outreach while increasing brand awareness
- Saved money by consolidating systems from multiple platforms

For more than 75 years, Southern California Material Handling (SCMH) has been a leader in providing top-brand forklift sales and warehouse solutions to clients across Southern California. Quality products coupled with excellent customer service are what make SCMH their region's most trusted complete material handling solution.

## Too Many Systems, Too Little Time

Agile and efficient are two things marketers today always need to be, but it's hard to be either when your processes and data rely on and reside in multiple systems. Southern California Material Handling (SCMH) was in that exact position roughly five years ago.

As a leader in forklift sales and rentals in their region, as well as providing OSHA-required training courses and warehouse storage solutions, SCMH has many messages to communicate and a large sales team to support. Since their disparate systems weren't serving their sales or marketing needs or budgets, the company embarked on a search for a better way.

"At the time, we were spending far too much time setting up email campaigns and trying to analyze, track and report on results across all our marketing initiatives," recalled Mara Gaborro, SCMH's Marketing and Communications Manager. "For the efficiency of our marketing efforts, we wanted to push out, track and nurture from one cohesive system as opposed to using multiple platforms. We knew that making such a move would be essential for our continued success."

## Bringing it All Together

SCMH first focused on the CRM side of things. The company selected Microsoft Dynamics CRM for a variety of reasons including that it gave them more options for the marketing platforms that they could utilize.

After implementing Dynamics, the search was on for a marketing automation solution that could help streamline their marketing processes and align their sales and marketing teams. Their list for the search included many of marketing automation's major players. SCMH selected ClickDimensions because the platform is natively built in Dynamics CRM, eliminating the need for complex implementations and constantly syncing systems, while also having a broad feature set.



*"We selected ClickDimensions because it was all encompassing. It included e-mail marketing, automated campaigns, event management tools, surveys, forms and more. Everything we needed was right at our fingertips and seamlessly integrated with Microsoft Dynamics 365."*

Mara Gaborro,  
Marketing and  
Communications Manager

Once they were up and running with ClickDimensions, the SCMH team focused on overhauling their email marketing processes using campaign automation. "We set aside the time to schedule our campaigns for our sales reps for a set time frame. Getting all our campaigns composed and automated in one week and then leaving it to run for the entire quarter is such a convenience," Gaborro said. "All I have to do is track the success of each campaign on a daily basis."

Going beyond email marketing, SCMH also replaced their existing event and survey tools with ClickDimensions' all-in-one functionality while also utilizing the platform's landing pages, forms, web tracking and social marketing tools.

## Saving Time and Money While Improving Results

"ClickDimensions enables us to work efficiently," Gaborro remarked. Their use of the ClickDimensions campaign automation builder is a prime example of this increased efficiency.

*With their new automated campaigns in place, SCMH enjoyed a 50 percent reduction in the amount of time spent on setting up routine email campaigns.*

They realized additional time savings thanks to ClickDimensions being natively built inside Microsoft Dynamics CRM. "Using ClickDimensions forms for our Contact Us and Request a Quote forms on our website allows us to deploy leads directly to the assigned territory managers instantly thanks to the integration with our CRM," said Gaborro. "This integration has helped us with our annual events too. Using ClickDimensions, all our previous data is held in CRM, allowing us to revisit performance, re-target and execute in one environment."

SCMH also used ClickDimensions native integration to their advantage for their recent rebrand campaign. With ClickDimensions integrated into their CRM, the SCMH team found it easy to target leads and customers with the right messages and achieve their goal of generating brand awareness.

Moving from many systems to one had a positive impact on SCMH's marketing budget as well. As an example, Gaborro shared, "We wanted to survey our customers on how we were performing, but it is very expensive to outsource to third-party survey companies. So, we took a shot at running it ourselves via ClickDimensions. The functionality and the reporting are comparable to that of a professional survey company. We saved a lot of money and at the same time we were able to get the information we needed to better serve our customers."



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