

# Customer Dynamics

*"Though we didn't have a champion to work with us in the beginning of the project, once the Microsoft Dynamics CRM system came online and management saw the kind of information it made available in the reports we built, everybody started to realize it was a very valuable tool. Curtiss-Wright corporate saw the value, as well, and the software is now being extended into other divisions. Customer Dynamics was essential in making the project so successful."*

- Greg Lamb  
Industry Analyst and Product Manager

## Delta Valve

Energy industry manufacturer is able to improve customer service and increase revenue through better, more comprehensive customer information in Microsoft Dynamics CRM

DeltaValve is a manufacturer and global supplier of critical components in the refining of crude oil. It designed and developed the revolutionary DeltaGuard, an automated valve that sits at the bottom of coke drums used in the 'cracking' process in refining heavy crude. The innovative technology eliminates the danger of grave injury to workers who previously had to manually release the valve to empty drums at the end of the 'delayed cooking,' high-heat process so essential to refining petroleum.

Based in South Jordan, UT, DeltaValve is a unit of Curtiss-Wright, a diversified, multinational provider of highly engineered, technologically advanced products and services for three primary product sectors: motion control, flow control, and metal treatment. The South Jordan enterprise, which operates within the Flow Control business unit, specializes in the design, engineering, and manufacturing of critical industrial valves and related equipment. The DeltaGuard device set a new global standard for the coke-drum 'unheading' process. The company has over 200 installations worldwide, and controls nearly 40 percent of the U.S. market for critical components in delayed cooking processes.

## At a Glance

### Company

Delta Valve USA  
857 West, South Jordan Parkway  
Suite 100  
South Jordan, UT 84095

### Website

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

### Number of Employees

120

### Products and Services

Manufacturer of critical equipment for the petrochemical refinery industry

### Target Market

Global petrochemical refineries.

### Applications Used

Microsoft Dynamics CRM



Knowing your customer has never been more vital than it is in today's market. The desire to better understand the needs of its customers was clearly the impetus behind DeltaValve seeking to find a way to consolidate all the various customer data sources in the company into one central repository. Having all customer information in one place would make it possible to aggregate data in whatever manner sales and management needed to answer critical questions capable of driving revenues.

"We had a lot of different databases scattered throughout the business," says Greg Lamb, DeltaValve industry analyst and product manager. "We needed a better way to keep track of

***"One of the key innovations Customer Dynamics has helped engineer is linking the system with industrial databases to make it easy to access information on prospects directly from within Microsoft Dynamics CRM."***

what products they had; what the serial numbers were; when we shipped it to them; whether we'd invited them to one of our seminars or workshops. We needed to do a better job of managing information about both our customers and our prospects."

At the time – mid-2006, Lamb was customer service manager, tasked with managing those concerns. He began researching CRM vendors and invited a select number to make presentations. "Security and integration were the two key factors for us," he explains. "We wanted the data to remain in-house, under our control. And we wanted the CRM system to integrate with the Microsoft suite we used." The decision to go with Microsoft Dynamics CRM was a natural. Consequently, DeltaValve began working with Customer Dynamics, the local Microsoft VAR and system integrator handling the CRM product.

Customer Dynamics joined with Lamb and the company's IT manager to get the system comprehensively mapped to all the disparate data sources for data migration. Moving the project forward was made more complex for the fact that the company was growing so rapidly it hadn't yet developed well-documented business processes since being acquired by Curtiss-Wright some years before. "We were laying the track at the same time we were running the train over it," Lamb says.

"In the beginning, without a champion, it was a challenge to get major division managers to collaborate with us to map the business processes," he says. "Customer Dynamics was indispensable in getting this done."

Corporate interest shifted once management began to see the kinds of reports the system provides. "At that point we started to get a lot more buy in," says Lamb. Currently, roughly a third of the company uses Microsoft Dynamics CRM in the performance of their jobs.

One of the key innovations Customer Dynamics has helped engineer is linking the system with industrial databases to make it easy to access information on prospects directly from within Microsoft Dynamics CRM. Key people at each refinery, what equipment they have, and the location – linked into Google maps, as well, are now at the fingertips of every company sales person. "I don't think anybody else in the business has done that," Lamb says. "We can now click on Google maps, as well, to find the most convenient airport to fly into."

Customer Dynamics has subsequently worked with Curtiss-Wright to help extend Microsoft Customer Dynamics CRM more broadly across the entire enterprise. Lamb has since been promoted into his new position as industry analyst and product manager; and the DeltaValve IT manager integral to the initial launch has also gained greater visibility within Curtiss-Wright, providing critical implementation guidance elsewhere. The small, but vital DeltaValve team – aided by Customer Dynamics – has helped map a new direction as well as lay the track to get there for the entire global enterprise.



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