

## Palomar Technologies Partners with Dyn365Pros and Microsoft Dynamics CRM for Long-Term Growth

Palomar Technologies designs and manufactures machines that assemble computers. Its products can place micro-optoelectronic devices as accurately as a few microns, magnitudes smaller than the diameter of a human hair. Palomar Technologies' award-winning precision assembly systems help customers in the photonic, wireless, microwave, automotive, aerospace, defense, medical and life sciences industries. It is headquartered in Carlsbad, CA, with sales and service offices in Germany and Singapore. Customers worldwide draw upon Palomar Technologies' decades of expertise and rich history in its industry.

### The Value of History

Palomar Technologies must remain nimble in the midst of an industry that is constantly innovating. Since 2009, Dyn365Pros has been working with Palomar Technologies to manage and improve its Microsoft Dynamics CRM system. As Palomar Technologies has experienced year-over-year growth, Dyn365Pros has been responsive, modifying its systems and processes and scaling its CRM software to meet new challenges.

Rich Hueners, Vice President of Sales and Marketing for Palomar Technologies, explains the benefit of this unique long-term partnership, "Dyn365Pros knows us. There is a real value in somebody knowing you."

"What Dyn365Pros has done well is help us weed out low-quality leads, focus on higher quality leads, making them actionable. In order to have the best forecasting model available, we cannot afford to fill our pipeline with opportunities that have a low probability of closing."

#### RICH HUENERS

Vice President, Sales & Marketing  
Palomar Technologies

### Scaling with Growth

The capital equipment business has a varying sales cycle. It can be three months to three years from the first contact with a customer to the time the customer places an order. Palomar Technologies needed to keep their customers constantly engaged at all stages of the cycle.

Palomar Technologies needed a new workflow model to manage the growing volume of leads. Lead qualification is crucial to the health of its business. It needed active, qualified leads for its sales team, who could in turn provide forecasts to production about upcoming orders.



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## A Customized CRM Solution

The business consulting team at Dyn365Pros saw that Palomar Technologies' lead qualifying process was both underused and overly complicated. In short, it required customization.

Dyn365Pros designed a workflow model for leads management:

- Users set time and sales-stage specific parameters for sending leads automated follow-ups.
- Sales tracks the workflow for those leads and is alerted to any action they need to take.
- Users set expiration dates on leads, so leads left too long are automatically deleted.
- Once leads were qualified, sales would enter them into a custom-designed six-stage pipeline.

Dyn365Pros created dashboards for marketing to track and manage leads, as well as for sales to track against their goals. At pre-defined later stages in the six-stage pipeline, production could get a report on what projects were near closing and plan accordingly.

As Hueners says, "What Dyn365Pros has done well is help us weed out low-quality leads, focus on higher quality leads, making them actionable. In order to have the best forecasting model available, we cannot afford to fill our pipeline with opportunities that have a low probability of closing."

Dyn365Pros has been key to not only helping us deploy Dynamics CRM, but in giving us ideas of what functionality was available — mostly outside-of-the-box — that could be implemented in our unique environment."

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## Improved Efficiency and Focus

Palomar Technologies now gets more from its CRM and data. We all know the old adage; time is money, but nowhere is this truer than in manufacturing complex machinery. With the help of Dyn365Pros, Palomar Technologies is getting a greater return on their CRM investment. With the new process:

- Marketing doesn't waste time following up on irrelevant leads.
- Sales concentrates on closing legitimate opportunities.
- Production doesn't waste time and resources planning for orders that don't close.

As Palomar Technologies continues to grow, Dyn365Pros will work with it to meet the ever-changing needs of its distinct manufacturing niche. Rich Hueners explains, "Because our company has worked with Dyn365Pros for so many years, Dyn365Pros understands our processes, many of which are customized and specific. Working with Dyn365Pros has been more efficient for us. Dyn365Pros has been key to not only helping us deploy Dynamics CRM, but in giving us ideas of what functionality was available — mostly outside-of-the-box — that could be implemented in our unique environment."



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