



CASE STUDY

# Metrohm ensures delivery quality and lifetime excellence with business process automation

ERP and CRM integration drives operational efficiencies and a consistent customer experience for improved business resilience

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Whether it's the food we eat, the medicines we take or the batteries we put in our cars, we trust that the products we use every day have been thoroughly tested for safety and quality. We get that assurance from Metrohm's analytical instruments, which have tested and certified goods of all sorts for nearly eight decades. With its eyes on the future, this manufacturing company embarked on a next-level digital transformation journey that would help it accelerate, integrate and improve its operations, sales and service.

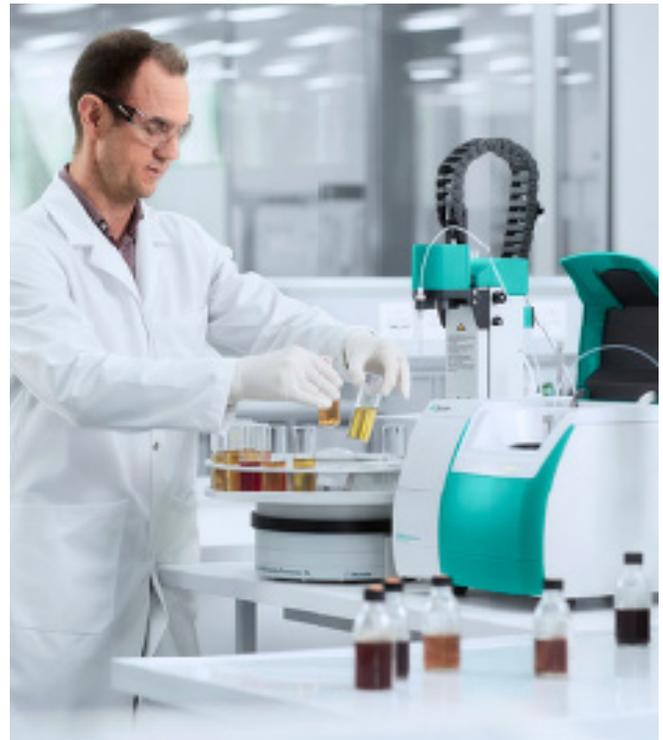
### Business Situation

#### Seeking process efficiencies

Metrohm is one of the world's most trusted manufacturers of high-precision instruments for chemical analysis. Its instruments and application know-how are used in laboratories in nearly every industry – chemical, petrochemical, pharmaceutical, food, power and more – in over 80 countries.

Given the nature of Metrohm's business, continuous improvement is essential for strengthening operational resilience. The company's instruments are typically used in industries with strong regulatory compliance, so many of those instruments need to be calibrated, re-calibrated and certified regularly. That means field service engineers carry out over half a million certifications every year.

This reach and specialty required a new enterprise resource planning (ERP) system to help Metrohm manage its operational processes more efficiently and a modern customer relationship management (CRM) system that would empower its sales and service teams to be more proactive. "Our processes were not harmonized to the degree in which we would have liked. We've got a lot of things going on in parallel and have to cut down on the time we need to do certain transactions," said



Peter Cass, IT program and portfolio manager at Metrohm. "The integration of the two systems will make a significant difference in performance. But the main motivation is business process automation. We want to eliminate unnecessary manual steps."

"With Avanade, we have access to a wide range of resources. We have a very good team of technical specialists from Avanade who can support us with Dynamics 365, especially the integration to other systems. Their capabilities helped us solve business problems with technical solutions."

**Peter Cass**

IT Program and Portfolio Manager, Metrohm

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With end-to-end processes, Metrohm could ensure it meets both customer expectations and company goals consistently. But first, it needs every country to move onto the same version of [Microsoft Dynamics 365](#). Avanade's technical expertise combined with our previous work with Metrohm made us the partner of choice for a smooth transition.

### **Solution** **Integrating Microsoft Dynamics 365** **CRM and ERP**

We are helping Metrohm upgrade from its Microsoft Dynamics AX 2012 and CRM 2011 systems to a more strategic platform on Microsoft Dynamics 365. We also created a template that each country can use to consolidate its ERP and CRM in one step. This technical integration of the Customer Engagement (CE) and Finance and Operations (F&O) applications allows data about customers, products and operations to flow across the enterprise seamlessly.

For example, if a customer quote is created in CRM, it is automatically converted into a sales order in the finance and operations system for fulfillment, accommodating any local tax and currency requirements, and then sent back to CRM for tracking. "We're laying the foundation for increased digitalization and customer interaction," said Cass. "Now the way the data is structured, we see more opportunities in the future to give customers access to more information about their equipment and services."

Better data flow and stronger automation also support Metrohm's marketing efforts. "It helps orchestrate our marketing activities on a global basis, enabling us to send out messages which are consistent across the globe and to track responses to promotions and events like trade shows." By delivering the solution with web services, we eliminated the need for middleware.

Another important feature is the access to data that field service engineers now have using the [Resco](#) Field Service 2.0 mobile app, which fully integrates with Dynamics 365 online. These employees can receive and complete



specific work orders, including securing customer signatures, directly on the app. The data automatically flows into the finance and operations system for invoicing or inventory transfers.

The solution is currently live in 17 countries, and we will continue the global rollout to 30 more countries over the next two years.

"Our new global template enables us to collaborate better between our different companies. We are now all working in the same way; we all talk the same company language; we can share marketing campaigns; and we can even utilize the international transfer of people in a better way."

**Daniel Waeger**  
CFO, Metrohm

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### Results

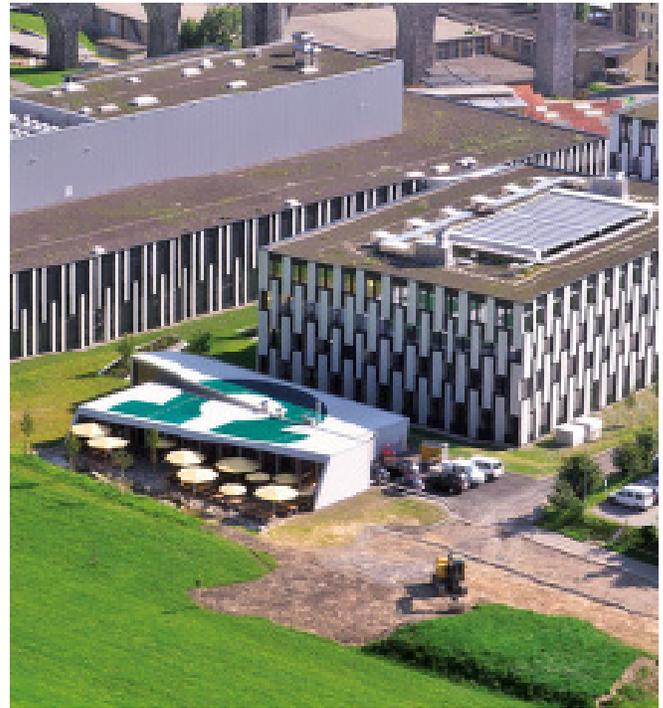
#### Boosting customer satisfaction with accuracy, consistency and productivity

Metrohm understands the importance of being agile in order to respond to evolving customer expectations around the availability and quality of their products. The new integrated user experience empowers teams to do their work faster and smarter, wherever they are located. "The functionality in CE enables us to book the best person in the right geographical area at the right time to do the best job for the customer," said Daniel Waeger, chief financial officer at Metrohm. It also supports the innovation that Metrohm seeks when investing in research, development and customer satisfaction. "We worked very closely with Avanade on developing a good solution that really fits the Metrohm requirements," said Cass. "This solution saves a lot of time and energy. What we have done is taken the integration to a new level both in terms of performance and the business intelligence that we have within the system."

#### Other benefits include:

- Greater data accuracy, especially now that information only has to be entered into the system once and it's shared across the enterprise
- Real-time access to information so multiple teams can increase their productivity and response times
- Streamlined, end-to-end processes that increase efficiencies and reduce operational costs

"The project acts as a catalyst to optimize our systems on a global basis," said Cass. "We want that customer experience to be consistent. It's not just a question of the hardware that we sell them but also the interaction with our customers in the long term." With newly structured data, Metrohm sees future opportunities to give customers access to more information about their equipment's performance and upcoming service requirements.



### About Metrohm

Metrohm is one of the world's most trusted manufacturers of high-precision instruments for laboratory and process analysis. The company was founded in 1943 by engineer Bertold Suhner in Herisau, Switzerland, where it is headquartered to this day. Metrohm offers a comprehensive portfolio of analytical technologies ranging from titration and ion chromatography to near-infrared and Raman spectroscopy, as well as several other techniques. Metrohm sells its products and provides services through its own local subsidiaries and exclusive distributors in more than 120 countries worldwide. Our mission in a nutshell is to help customers from virtually every industry analyze and maintain the quality of their products at every stage in the manufacturing process and beyond. Since 1982, Metrohm has been owned 100% by the non-profit Metrohm Foundation. This foundation keeps to its purpose to support charitable, philanthropic, and cultural projects in eastern Switzerland and, above all, ensure the independence of the company.

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### About Resco

Founded in 1999, Resco is one of the global leaders in developing cross-platform mobile software solutions. Today its products are utilized by 2,000+ customers with more than 200,000 licensed users. The cornerstone of Resco's multi-experience development platform is the Woodford configuration and management tool which, together with the Resco mobile apps, is at the heart of all Resco products. For more details on Resco, visit: [www.resco.net](http://www.resco.net)

### About Avanade

Avanade is the leading provider of innovative digital, cloud and advisory services, industry solutions and design-led experiences across the Microsoft ecosystem. Every day, our 56,000 professionals in 26 countries make a genuine human impact for our clients, their employees and their customers. Avanade was founded in 2000 by Accenture LLP and Microsoft Corporation. Learn more at [www.avanade.com](http://www.avanade.com)

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### North America

Seattle  
Phone +1 206 239 5600  
[America@avanade.com](mailto:America@avanade.com)

### South America

Sao Paulo  
[AvanadeBrasil@avanade.com](mailto:AvanadeBrasil@avanade.com)

### Asia-Pacific

Australia  
Phone +61 2 9005 5900  
[AsiaPac@avanade.com](mailto:AsiaPac@avanade.com)

### Europe

London  
Phone +44 0 20 7025 1000  
[Europe@avanade.com](mailto:Europe@avanade.com)