



## Microsoft Dynamics Customer Solution Case Study



## Ice Creamery Connects with Customers, Lowers Costs with Easy-to-Use Solution

### Overview

**Country or Region:** United States  
**Industry:** Retail and Hospitality—Food Service Industry

### Customer Profile

Cold Stone Creamery® serves ice cream, shakes, smoothies, and cakes to customers around the world. The company has more than 1,400 stores and approximately 30,000 employees.

### Business Situation

Cold Stone Creamery wanted to implement an online Birthday Club program—open to all customers—and at the same time, create a better connection to its customers.

### Solution

Cold Stone Creamery teamed with Microsoft® Gold Certified Partner TopLine Strategies and implemented Microsoft Dynamics™ CRM, which provides the backbone for its online Birthday Club program.

### Benefits

- Streamlined, immediate access to customer data
- Increased enrollment, lower costs
- Easy to use, minimal training
- Moving forward

“Microsoft Dynamics CRM provides us the ability to better serve our customers by delivering relevant communications and the innovative products they desire.”

Heather Dorr, Senior Manager of Marketing Information Systems, Cold Stone Creamery

Cold Stone Creamery® is famous for its ice cream Creations™, which contain any combination of fruits, nuts, or candy. Its popular Birthday Club provides members with free ice cream on their birthday. The company wanted to open this club up to all customers—not just children—and move the program enrollment online. In doing so, the company also wanted to centralize customer information, lower costs, and streamline marketing efforts. Cold Stone Creamery teamed with Microsoft® Gold Certified Partner TopLine Strategies and implemented Microsoft Dynamics™ CRM, which provides the foundation for the online Birthday Club program. Today, Cold Stone Creamery has immediate access to customer information, increased program enrollment, and lowered costs associated with the Birthday Club. The company also has an easy-to-use, familiar solution that it plans to extend to additional areas of its business.



## “Using Marketing Automation in Microsoft Dynamics CRM, we now deliver over 5,000 birthday e-mails a day to participants, reminding them to celebrate their birthdays with Cold Stone Creamery.”

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### Situation

In 1988, Donald and Susan Sutherland opened the first Cold Stone Creamery® in Tempe, Arizona, and took the initial step toward their goal of delivering the world’s best ice cream. Two decades later, the company has more than 1,400 stores and 30,000 employees around the world. In addition to cakes, smoothies, and shakes, Cold Stone Creamery specializes in serving customized ice cream Creations™ that are created by mixing ice cream with any combination of nuts, fruits, and candy on a frozen granite stone.

Cold Stone Creamery’s Birthday Club program is one way that the company demonstrates its deep appreciation for customers. This program rewards members with a coupon for free ice cream that can be redeemed on the recipient’s birthday. The program originally catered to children under the age of 13. To become a member, parents filled out a card and mailed it back to a third-party vendor who was responsible for entering the contact information into a database and sending out coupons to participants in the mail. While 200,000 customers happily received their coupons for free ice cream, Cold Stone Creamery wanted to create a system that would help build stronger connections with ice cream lovers. They arrived at an updated customer relationship management (CRM) solution with an online interface that would allow customers to enroll in the program through the company’s Web site and update their own profiles as often as they wished.

“We wanted to build an interactive relationship with ice cream lovers worldwide, in order to provide them with the ultimate ice cream experience,” says Heather Dorr, Senior Manager of Marketing Information Systems at Cold Stone Creamery.

Cold Stone Creamery recognized that implementing a fully featured, internally

managed CRM system could have benefits beyond its new and improved Birthday Club. The right solution could also be used to manage information related to its area developers, franchises, stores, and crew members—and to provide company executives with deeper insight into all these relationships.

“With our previous system, customer information was dispersed among several disconnected databases that were managed by external vendors. As a result, we couldn’t get a clear picture of our customers and often had to wait as long as a week just to access customer data,” says Dorr. “In addition to gaining immediate access to customer information, we also wanted to reduce the expenses associated with each mailer, speed the enrollment time, and open the program to all of our customers.”

### Solution

Cold Stone Creamery started by evaluating several CRM systems, including NetSuite CRM+, Salesforce.com, SalesLogix, and Microsoft Dynamics™ CRM. In the end, Microsoft Dynamics CRM—a solution that provides the tools and capabilities needed to create and easily maintain a clear picture of customers—was the winner.

“We chose Microsoft Dynamics CRM because it’s a flexible tool that integrates easily with other systems. It also provides a familiar interface and is easy for our employees to learn and use,” explains Dorr.

To help with the implementation, Cold Stone Creamery teamed with Microsoft® Gold Certified Partner TopLine Strategies—an IT services and consulting company based in Scottsdale, Arizona. A team of three developers spent less than six weeks of development time implementing Microsoft Dynamics CRM. Work included the following:

- Creating entities within Microsoft Dynamics CRM so that Cold Stone Creamery marketers can customize information for ice cream lovers and their children. Every ice cream lover has a unique e-mail address in the system, and associated family members are tracked by first name and birthday.
- Building custom utilities to migrate customer data from various legacy vendor databases to Microsoft Dynamics CRM.
- Using Microsoft ASP.NET and Microsoft Visual Studio® 2005 Professional Edition to build the customer-facing application that is used to enroll in the Birthday Club. The data that customers enter in this application is automatically stored in Microsoft Dynamics CRM.

With the new system, the Birthday Club is completely automated. Ice cream lovers enroll—or update their preferences—by completing a registration form on the Cold Stone Creamery Web site. This data is immediately associated with a customer record in Microsoft Dynamics CRM and available for reporting and analysis.

The Marketing Automation module in Microsoft Dynamics CRM enables Cold Stone Creamery to automatically generate and send e-mail messages to participants on their birthdays, reminding customers to visit the Web site to retrieve their coupon for free ice cream.

The company created custom reports to monitor enrollment trends and to track how much free ice cream is given away in a particular week or month. Reports can be generated for the entire company, for a particular region, or for a specific store.

“Microsoft Dynamics CRM provided the flexibility Cold Stone Creamery needed to build a solution that meets their exact needs,” says Scott Johnson, Senior

Consultant for TopLine Strategies. “It ties into their workflows and their public Web site and helps maintain the high standards of their brand.”

## Benefits

Since implementing Microsoft Dynamics CRM, Cold Stone Creamery has enjoyed many benefits. Highlights include immediate access to customer data, reduced costs associated with the Birthday Club, and quick adoption of this easy-to-use system.

### **Streamlined, Immediate Access to Customer Data**

With Microsoft Dynamics CRM, Cold Stone Creamery has all the information related to its birthday program participants in a single, accessible location. The company no longer waits for a third party to deliver this information, and instead has immediate access to customer data. As a result, the company has better insight into its customers, which enables Cold Stone Creamery to build stronger connections with those customers.

“Our objective is to build interactive relationships with ice cream lovers worldwide and to provide them with the ultimate ice cream experience,” says Dorr. “Microsoft Dynamics CRM provides us the ability to better serve our customers by delivering relevant communications and the innovative products they desire.”

### **Increased Enrollment, Lower Costs**

Before moving to Microsoft Dynamics CRM, Cold Stone Creamery had approximately 200,000 Birthday Club members who enrolled in the program by mailing in an enrollment application. Today this process has been moved online and has become significantly streamlined. The success of the program is evident by the numbers: The company currently has over 1.5 million

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Birthday Club participants and enrolls thousands of new members daily.

Moving the program online has also reduced the associated costs. Cold Stone Creamery once spent an average of \$0.80 printing and mailing each free ice cream coupon, but these costs have been slashed to just pennies. According to Dorr, “Our implementation of Microsoft Dynamics CRM will result in multimillion dollar savings for Cold Stone Creamery over the next two to three years.”

“Using Marketing Automation in Microsoft Dynamics CRM, we now deliver over 5,000 birthday e-mails a day to participants, reminding them to celebrate their birthdays with Cold Stone Creamery,” says Dorr.

#### **Easy to Use, Minimal Training**

Cold Stone Creamery currently has five customer service representatives interacting with Microsoft Dynamics CRM and plans to eventually see this number increase to an estimated 100 users throughout their organization. Because Microsoft Dynamics CRM is designed to work with Microsoft Office Outlook®, which is a tool already in use throughout Cold Stone Creamery, user adoption and training was easy.

“Within an hour of receiving a simple overview of Microsoft Dynamics CRM, our customer service representatives were working productively with the system,” says Dorr.

#### **Moving Forward**

Building on their success engaging with ice cream lovers through the Birthday Club, Cold Stone Creamery plans to deploy a second instance of Microsoft Dynamics CRM to manage information related to internal business operations. Dorr expects to gain operational efficiencies and improve the relationships throughout the Cold Stone Creamery community by using Microsoft Dynamics CRM to maintain information on franchises and area developers, and to manage internal communications with more than 1,400 stores and more than 30,000 crew members.

## For More Information

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For more information about TopLine Strategies products and services, call (480) 503-8584 or visit the Web site at: [www.toplinestrategies.com](http://www.toplinestrategies.com)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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### Software and Services

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- Microsoft Visual Studio
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### Partners

- TopLine Strategies