



## Microsoft Dynamics CRM Customer Solution Case Study



### Overview

**Country or Region:** United States  
**Industry:** Marine fuel wholesaler

#### Customer Profile

Founded in 1995, Bunkers International is a leader in the marine fuel industry, providing trading, physical supply, and brokering services to ship operators around the world. Since inception, the company has serviced several thousand customers, providing tens of thousands of ships with millions of tons of fuel. In 2000, Bunkers International established a joint venture in Colombia with Vanoil, S.A., called BunkersOil Colombia. Through this joint venture, Bunkers International has grown to become the largest marine fuel supplier in Colombia.

#### The Challenge

Bunkers International was working with only Microsoft Office programs, and thus had very manual processes. This required extra work and expense.

#### The Solution

Microsoft Dynamics GP, Microsoft Dynamics CRM 2011 and Scribe Insight

#### The Results

Top-feature versatility, established and effective workflows and processes have been established and now the company is able to reduce costs, centralize data and streamline the sales process.



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## IBG Gets Bunkers International Corp. Off Spreadsheets and On CRM

Bunkers International, based in Lake Mary, Florida, is a leading provider of marine fuel to many of the world's largest shipping and cruise companies. The company has 13 locations around the globe, with offices in the United States (including New York and San Francisco), Greece, Hong Kong, Brazil, Chile, Turkey, South Africa, Singapore, Colombia and the United Kingdom.

"Bunkers International is a sophisticated business," explains John Canal, CEO of Bunkers International. "We have a simple sales cycle but a complex sales workflow and approval process that has to be executed in a short time period."

For more than a decade, the company primarily used simple Microsoft Office systems for sales operations. Sales quotes were compiled on Microsoft Office and credit management was handled using Excel or paper credit files. Paperwork had to be physically moved among the various departments, resulting in errors, wasted time and lost paperwork. Information was decentralized and, since most salespeople worked off their own laptops, if they left the company, information gaps would hinder continuity.

Additionally, the credit approval process could lag the actual sale of fuel, which could lead to timing issues. Two sales people selling fuel at the same time in different regions could accidentally take customers over their credit limit. In some cases, by the time Bunkers was alerted to credit issues, the ship was already fueled, thus creating a risk that might have resulted in a ship to arrest if the buyer never paid up front. As anyone can imagine, this issue got costly and involved for the provider.

Prior to engaging Integrated Business Group (IBG), Bunkers purchased Salesforce.com in an effort to move to CRM...and the experience was disastrous. "It was extremely limited and not capable of decision trees," explains CFO Alfred Canal. "We scrapped it after two years and had to abandon the investment. Salesforce had many fundamental limitations that limit its appeal for businesses. It limited the number of custom fields you could create, and it could not handle decimals past

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—Mr. Alfred Canal, CFO  
Bunkers International

four digits. These were deal-breakers for us.”

After that experience, Mr. Alfred Canal considered an Apple product, FileMaker Pro, but realized it had scaling issues and no way of integrating with Microsoft Outlook. “A CRM workflow was too foreign for our salespeople,” he says. Their accountant recommended IBG and, after a preliminary meeting with Bunkers, the specialists demonstrated software solutions and introduced Bunkers to the Microsoft Dynamics cloud-based CRM in 2011.

Today, per IBG’s recommendations, 19 new workflows have been implemented. Several of those work together simultaneously to monitor the status of a particular operation. Workflows pass an order from sales to credit, then to operations, accounting and fulfillment, utilizing queues and emails to complete the process. IBG fully integrated CRM with Great Plains accounting software using Scribe Insight, a system that synchronizes customers, suppliers, brokers, contacts, products, sales orders, quotes and invoices.

“It’s extremely functional software,” Mr. Alfred Canal says. “It is very, very sturdy. It’s a very feature-rich system. We cut back on a lot of capability with Salesforces.com but we were able to add capability with Microsoft Dynamics CRM.” And having real-time access to credit information has saved the company thousands of dollars. “CRM allows for credit terms to be alerted immediately,” explains Sales Coordinator Kristin Montjoy. In addition to real-time credit “hold” and credit limit checks, the new system also generated consistent trade and brokering agreements with legal language that is always updated and appropriate for the type of deal they are generating.

The IBG CRM team helped ensure success by bringing a complete solution. “IBG gave us the big picture,” sales Mr. Alfred Canal. “They brought not only the CRM software but the middleware, hosting solution, server requirements and other software requirements. They made sure we had a complete solution, not just components, and they had the expertise to guide us where we needed upgrades or changed to make the system really perform up to expectations.”

As for the staff’s learning process, most were very resistant to change. But Mr. Alfred Canal says the IBG implementation team did a great job teaching his staff “new tricks.”

“IBG’s CRM team is quite capable and knowledgeable,” he explains. “We were able to train our Turkish office in two days. Kristin did three weeks of follow-up and now they are fully functional. We were very impressed that we could implement the product so far away to non-native speakers and have it go so well. ”

### More Information

Integrated Business Group, a Microsoft partner, has achieved a Silver Enterprise Resource Planning Competency & Learning Competency, a worldwide recognition for commitment to providing comprehensive training solutions for Microsoft technologies—strengthening IBG's standing in the marketplace and enabling IBG to reach more customers.

For more information about Integrated Business Group products and services, call (407) 677-0370 or visit the Web site at [www.ibgnet.com](http://www.ibgnet.com)

For more information about Bunkers International Corp. products and services, call (407) 328-7757 or visit the Web site at [www.bunkersintl.com](http://www.bunkersintl.com)



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Thanks to the new system, global currency and fuel quantity conversions are a snap for the accounting department. And, though Bunkers' accounting staff voiced reluctance about going paperless—especially due to stringent legal requirements and guidelines requiring them to maintain records on fuel sales—once Mr. Alfred Canal set down a rule that printing is forbidden, they started to see other benefits too. "For each order it took an inch of paper," he says. "Now we're down to six pages." And, he adds, "We don't have to shred, store, pay for ink and guard the paper with security systems and cameras. I'm estimating we'll save 10 percent of our overall invoice processing costs."

Bunkers International reports that the first few months with the new system have been successful for myriad reasons. Ms. Montjoy says, "This really is a way to force continuity throughout the global company."

### Measures of success:

- Mountains of paperwork are nearly eliminated entirely
- Real-time credit analysis has resulted in significant savings
- Lost paperwork and errors are drastically minimized
- The accounting department can easily perform currency conversions and fuel quantity conversions
- Information is now centralized and not spread across the globe
- Quotes are consistent in all offices