BLANCHARD AND COMPANY, INC.

About Blanchard and Company, Inc.

- Founded in 1975

- 450,000 customers to date

- Over $1 billion in sales over the last three years alone

- Owned and sold more than half of the published 100 Greatest U.S. Coins

- 85+ employees

- Headquartered in downtown New Orleans

- Office in Dallas

Your Challenge:

- Providing secure, compliant and productive business communications

- Manage various document management tasks in a decent time

- Merging data from several related entities at once

- Reorganisation of the order and shipping confirmation processes without major changes in the existing CRM

- Installing a robust, yet flexible document merge solution

Our Solution:

MSCRM-ADDONS DocumentsCorePack for Microsoft Dynamics CRM

The premier choice for precious metal investing

For more than 40 years, Blanchard and Company, Inc., has been a peerless authority in rare coins selection. The company stands for personal dedication to every single customer, as well as for highest quality standards in the field of numismatics.

Investing in rare coins not only means acquiring a decent portfolio but also engaging in a business relationship that goes deeper than the regular B2C interdependence.

Some of Blanchard's customers have become close friends through the years, as a result of Blanchard's cross-generational dedication to them.

It is therefore not surprising, that the company partners with the best: John Albanese, America's number one expert in numismatics, personally handpicks the finest coins for Blanchard clients.

How to reorganise internal data processing without major sacrifices?

Providing high quality services for their customers while growing steadily presented Blanchard and Company, Inc. with several challenges.

Seamless order and shipping confirmation processes, as well as merging data from several related entities at once were only two of the requirements Blanchard needed to provide constant high quality customer services.

Apart from that, Blanchard deals with a lot of sensitive data. This is why providing secure, compliant and productive communication is another core element of their business.

All in all, the call for a robust, yet flexible document solution without major changes of the existing CRM grew louder.

A lot of challenges - one outstanding solution

Whenever fast and easy document creation and automatic merge of documents based on CRM data is needed, DocumentsCorePack for Microsoft Dynamics CRM is the key!

From producing order confirmation documents automatically up to the fully automated shipping confirmation: DocumentsCorePack guarantees a seamless workflow by providing full automated document creation.

Since the installation of [DocumentsCorePack for Microsoft Dynamics](#) CRM by Blanchard, handling critical business communication has become a piece of cake, while the quality of security stays the same.

Statements:

"Blanchard and Company, Inc. is leveraging the MSCRM-ADDONS Documents Core Pack and AutoMerge Addons to handle several critical business communications and document management tasks. The products ability to merge data from several related entities at once is the key feature in our selection to utilize it in our order confirmation and shipping confirmation processes. We at Blanchard are very pleased with the product and would highly recommend mscrm-addons products to anyone looking for a robust yet flexible document merge and delivery solution. Mscrm-addons has provided top notch assistance with initial setup and better than expected support since the original install. "

Ed Glover, Blanchard Company, Inc.

"With DocumentsCorePack, we were able to deliver a solution to meet an important requirement for Blanchard and Company, Inc. Order and shipping documents are now created and sent for delivery seamlessly through CRM by leveraging the DocumentCorePack. Installation and Configuration was straightforward and the results are delivered in a way we couldn't achieve using SSRS-reports. I would highly recommend DocumentsCorePack for any company tackling requirements around document merging and delivery."

Scott Sewell, Hitachi Solutions

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Europe: +43 (316) 680 880
Untied States: +1 404 720 6066

www.mscrm-addons.com
office@mscrm-addons.com

mscrm-addons.com

We are a Microsoft Gold Certified Partner and offer high-quality software solutions and service for the realisation of sophisticated IT projects and requirements. In 2004, we started to develop and support a wide range of Add-ons for Microsoft Dynamics CRM. Our innovative Add-Ons close gaps existing in the standard CRM and extend it with useful functionalities. Our products hence allow a more efficient use of CRM within your company as they enable more fluent and quicker CRM processes and a better overview in and handling of the CRM system.