For more information about other Microsoft customer successes, please visit: [www.microsoft.com/casestudies](http://www.microsoft.com/casestudies)

**Customer:** Core Cost Management

**Website:** [www.corecostmanagement.com](http://www.corecostmanagement.com)

**Customer Size:** 5

**Country or Region:** United Kingdom

**Industry:** Telecommunications

**Partner:** Fusion CRM

Customer Profile

Core Cost Management provides consultancy and outsourced telecoms services to medium-sized businesses. It helps them control costs and make sensible investment decisions.

Software and Services

* Microsoft Dynamics
* Microsoft Dynamics CRM Online
* Microsoft Office 365
* Microsoft Exchange Online
* Microsoft Lync Online
* Microsoft SharePoint Online

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| Microsoft Dynamics  Customer Solution Case Study |
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|  | V:\FY13\QAB UK Non Metia\Published\CCM\ccm-logo.jpg |  | Dynamics HeaderTelecoms Consultancy Improves Sales Performance with Integrated Solution |
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“It’s a brilliant system. Microsoft Dynamics CRM and Office 365 are allowing us to perform better and they will grow with us.”

Nick Cassidy, Managing Director, Core Cost Management

Core Cost Management (CCM) works with medium-sized businesses to get the best out of their telecoms. It wanted to replace its existing customer relationship management (CRM) system with a centralised, easy-to-manage solution. With Microsoft Dynamics CRM and Microsoft Office 365, employees communicate more effectively, saving time and reducing the amount of travel required. It is also improving leads and boosting sales performance.

Business Needs

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CCM was using Salesforce.com software, but experienced a number of challenges that hindered efficiency. Its sales people were frustrated at having to switch between Salesforce.com tools and other applications such as email. The firm wanted a faster, integrated CRM solution that would give staff direct access to their leads without having to move between applications.

It also wanted an advanced search tool and easy-to-use functions for mail merges and setting sales lead reminders. CCM was looking for a system that it could design and easily update to suit its business. With staff operating from multiple locations, it also needed to make working across different sites easier.

Solution

With help from Microsoft Partner Fusion CRM, CCM chose Microsoft Dynamics CRM Online and Microsoft Office 365, which includes Microsoft Exchange Online, Microsoft SharePoint Online, and Microsoft Lync Online. This cloud-based solution also appealed to CCM because it removed the costs of running, maintaining, and updating an on-premises server.

Fusion CRM set up the CCM solution with minimal disruption to the business, and it was also able to make enhancements remotely. Nick Cassidy, Managing Director at Core Cost Management, says: “The Fusion team were friendly and easy to work with. Nothing was too much trouble and they helped us find the right solution fast.”

Benefits

Choosing an integrated Microsoft solution has not only improved CCM sales performance, but it has also helped the team communicate more efficiently—crucial when personnel are working across multiple locations. Cassidy says: “It’s a brilliant system. Microsoft Dynamics CRM and Office 365 are allowing us to perform better and they will grow with us.”

* **Reduced travel and enhanced communication.** Thanks to Office 365 and Microsoft Lync Online, staff can now hold important meetings without having to travel. As well as increasing the operation’s overall efficiency, this saves time and cuts costs. “It’s very convenient for us,” says Cassidy. “Three people in three different locations can join a video conference and have a meeting at a moment’s notice. In addition, video conferencing is much more interactive than a voice call.” Cassidy estimates that a three-person video conference probably saves a combined six hours of travel time for all the people involved. CCM team members also save time by being able to see colleagues’ availability for calls and conferencing. This makes the company’s everyday activities more efficient.
* **Easy access to integrated storage.** By using Microsoft SharePoint Online, which is provided as part of Microsoft Office 365, the team no longer has document version control issues. With one version stored online, everyone can work on the same files. This results in fewer mistakes and easier document management. Plus, when team members look at customers’ details in Microsoft Dynamics CRM, they’re able to see a list of associated and relevant documents in Microsoft SharePoint Online, directly from customers’ records. This means not having to switch from one application to another, which saves significant time for employees.
* **Single centralised system.** Because all of the Microsoft Dynamics CRM tools appear within the Microsoft Outlook messaging and collaboration client, the team has easy access to leads, customer records, and the mail-merging facility. “If we’re working on marketing campaigns aimed at law firms or banks of a certain size, for example, we can select our targets quickly and create a workflow for the stages of the campaign. This is useful because we can set automatic reminders for follow-up actions,” says Cassidy. Mail campaigns are now more efficient and the business saves time.
* **Better sales performance.** Microsoft Dynamics CRM allows the management team to see an individual sales team member’s performance and react accordingly.Cassidy says: “Microsoft Dynamics CRM allows us to manage, monitor, and support our sales teams remotely. When we switched to the new system, it boosted the number of calls made by the sales team because the system is integrated and easy to use.”
* **Simple records management.** With Microsoft Dynamics CRM, the management team can assign customer records or cases to specific team members. This is beneficial for lead management and ownership. Teams can also set parameters for each person, such as defining who is allocated a task or what kind of role the person has in an interaction with the customer. “We can decide who can download information into an Excel spreadsheet, and who’s got further access rights,” says Cassidy. “We now have more control over what’s going on and who can see what. All this can be configured by sales region and types of target business. We have the flexibility, for example, to expand someone’s area and give them more leads.”
* **Improved leads.** Importing leads is now easier, more efficient, and more accurate with Microsoft Dynamics CRM. In turn, this benefits sales and overall business performance. “We can easily predefine how leads are imported into the system,” says Cassidy. “We can sift through and freshen up our leads before we import them—it’s all much easier than before.”