

Microsoft



BUSINESS SUCCESS

Microsoft Dynamics CRM **CUSTOMER SHOWCASE**



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REAL CUSTOMERS: REAL STORIES: REAL BUSINESS RESULTS

Microsoft Dynamics CRM provides organizations with a highly flexible customer relationship management (CRM) platform that can adapt, grow, and scale along with your business. This release delivers capabilities that fit the needs of real people working in today's business environment while meeting the requirements of any size business, including global enterprises.

Microsoft Dynamics CRM is built on a commitment to provide organizations with the **Power of Choice** to make it easy for you to evolve your business unencumbered by technology limitations. Designed with a single unified code base for both on-premise and on-demand deployments, Microsoft Dynamics CRM enables customers to choose the right deployment model for their specific business and information technology (IT) needs, with the flexibility to change deployment models over time if business or IT preferences change.

Read the following stories to see how businesses have achieved consistent and measurable improvement in their everyday business processes in marketing, sales and customer service through the deployment of Microsoft Dynamics CRM.



Microsoft Dynamics CRM Helps **Abacus Group PLC** Stay Current with Multi-lingual Employee Collaboration

COMPANY

Abacus Group PLC
www.abacus-group.co.uk

VERTICAL INDUSTRY

Electronic Component Distributor

SEGMENT

Medium Business—900 employees

COUNTRY/REGION

EMEA

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server® 2003
Microsoft Office 2003
Microsoft Exchange Server 2003
Microsoft SQL Server® 2005
Windows® XP

MICROSOFT PARTNER

Evorio IT Consulting
www.evorio.co.uk

SITUATION

Abacus Group is a major distributor of electronic components to OEMs throughout nine European nations. The cost of implementing and maintaining multiple instances of a CRM solution prevented managers from implementing a single, integrated application. "We have a presence across Europe and can't implement CRM effectively without the ability of employees to view customer data in their own languages," says Stefan Maja, MIS director for Abacus Group PLC.

SOLUTION

In the wake of two corporate acquisitions, managers needed to standardize on a single CRM platform. One of the acquired companies used SalesLogix while the second used Microsoft Dynamics CRM. Following a head-to-head competition between the two, managers selected the Microsoft solution. "[Microsoft Dynamics] CRM works well with Office Outlook and other Microsoft platforms," explains Maja. "We wanted to continue that user familiarity versus switching to a different platform." When the latest version became available, managers chose to upgrade to it. "Microsoft [Dynamics] CRM 3.0 has been used as a fairly standalone solution at our company," says Maja. "But with 4.0 we're looking to integrate it with our ERP system as well as use the more robust workflow and new multi-language capabilities."

BENEFITS

"Operationally, [Microsoft Dynamics] CRM allows us to maintain one server based in the UK which our team can support easily," says Pallab Mandal, operations manager for Abacus. That contrasts with the costly alternative, which would have required each language-based instance to have its own server. Moreover, the latest version's more robust features make it easier to create reports based on constantly changing criteria. Additionally, enhancing productivity figured into the manager's decision to upgrade. "The workflow in 4.0 is much more enhanced than in 3.0 and is something that we need to increase our efficiency," says Mandal.

"Microsoft Dynamics CRM allows a deep level of collaboration among our employees across multiple languages and currencies to a level we've never experienced before."

Stefan Maja, MIS Director, Abacus Group





Total Structures, Inc. Gets Support from Microsoft Dynamics CRM Live to Enhance Sales Force Productivity

SITUATION

When major event organizers require a structure to support the lighting, staging, and PA equipment necessary to make their show a success, they come to Total Structures. The firm's salespeople must possess a high degree of technical ability to map out what can be done. Managing the sales and delivery of services using Microsoft Office Excel® spreadsheets and e-mail alone wasn't sustainable for them. "We have a long sales and fulfillment cycle," explains Adrian Forbes-Black, vice president for Total Structures "In order to keep tabs on prospects and shepherd opportunities to closing, our techie salespeople need a CRM tool to guide them through the sales process."

SOLUTION

Total Structures is a small company that lacked the staff to support an in-house solution. "That was a major reason I chose the Microsoft [Dynamics] CRM Live implementation model," says Forbes-Black. To date, he has completed basic customization of the sales module, adding an IM field and removing non-essential fields. Next, sales processes will be encoded into workflows to automate communications and reminders that nudge salespeople along. Soon after, the service and marketing modules will be phased into use. "Microsoft [Dynamics] CRM [Live] is easy to use, which helped with buy-in from our salespeople," says Forbes-Black.

BENEFITS

"Microsoft Dynamics CRM Live leads our salespeople through the process," explains Forbes-Black. "It was a no-brainer to go with because an increase in efficiency alone will more than make up for the inexpensive cost." By going with a Live deployment model, the company's mobile sales force can easily work offsite. "Our people can access the customer database through an Internet connection, which allows them to work independently," says Forbes-Black "They can access a prospect's record from a trade show and understand the relationship we've had with them in the past, for example." And because customer data is centralized, employees can access it and continue to do work when their colleagues go on vacation or leave.

"Microsoft Dynamics CRM Live serves a vital role in substantially increasing the efficiency of our sales people." Adrian Forbes-Black, Vice President, Total Structures

COMPANY

Total Structures, Inc.
www.totalstructures.com

VERTICAL INDUSTRY

Structural Systems Manufacturer

SEGMENT

Small Business

COUNTRY/REGION

United States

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live 4.0
Windows Small Business Server 2003
Microsoft Office 2000
Microsoft Exchange Server version 6.5.7638.1
Windows XP Professional and
Windows Vista® Business

MICROSOFT PARTNER

Workopia, Inc.
www.workopia.com





TRAIL BLAZERS

Portland Trail Blazers Slam Dunk Productivity Enhancements to Boost Ticket and Sponsorship Sales

The Portland Trail Blazers organization sells tickets to 41 home basketball games as well as an estimated 250 additional events per year. With professional sports, concerts, and family events to promote, the firm has developed an extensive list of customers and prospects. Advertising revenues exist for each of these events. As the team's legacy Onyx CRM implementation neared its end of life, managers compared three alternatives to replace it. They chose Microsoft Dynamics CRM for its ease of use, adaptability, and scalability as well as its ability to increase efficiency.

BUSINESS NEEDS

The Portland Trail Blazers sales office focuses on two product groups. The first is tickets to the NBA team's 41 home games a year as well as an estimated 250 additional events held at the Portland Rose Quarter campus. The 290 annual events draw all kinds of ticket purchasers—from sports fans to parents to teens anxious to hear the latest band in concert. The revenues from sponsorship sales make up the second of the organization's product groups. The above events have the capacity to pull in 1.6 million people annually; consequently, there is a high demand from businesses to advertise at these events.

The Trail Blazers' sales cycle for team tickets begins in the spring and continues throughout the season. "We focus heavily on basketball season ticket sales, then multi-game package sales and finally individual ticket sales," says Chris Dill, vice president and CIO for the Trail Blazers' organization. "By the first quarter of the year, we shift our emphasis to season ticket renewals. A robust CRM solution is key to the success of our sales team and to our service department for the season ticket sales renewal cycle." Unfortunately, the Trail Blazers' legacy implementation, Onyx CRM, was nearing its end of life and the organization had to implement a new one rapidly.

SOLUTION

Dill's team quickly narrowed viable options to three: Salesforce.com; SAP's CRM solution, and Microsoft Dynamics CRM. "Our evaluation criteria included ease of use, customizability, the ability to create different view/data access experiences for our various departments, scalability, and the flexibility to change and evolve as our organization grows," states Dill.

There were two major reasons why the IT team chose Microsoft Dynamics CRM. "In my experience, people typically revolt against a user interface if it's cumbersome," explains Dill. "The familiar Microsoft look and feel was a big plus. Another thing we liked was the fact that we could adapt Microsoft Dynamics CRM to our business and processes. With our old application, we had to adapt our processes to fit into the software's architecture."

IT staffers worked with a Microsoft partner experienced with Microsoft Dynamics CRM to implement an on-premise deployment of the three modules: marketing, sales, and service.

The Trail Blazers' data model makes Microsoft Dynamics CRM a bridge between the organization's ticketing and sponsorship sales inventory systems. "Microsoft Dynamics CRM pushes and pulls data and contact information to these two systems to give our salespeople as complete a profile and history picture as possible," says Chris Cook, marketing manager for the Trail Blazers.

Additionally, the solution is being integrated with the organization's Eloqua e-mail marketing application. "We use Eloqua to do permission marketing," adds Cook. "Data sharing between it and Microsoft Dynamics CRM is critical, not only to select the appropriate recipients for communications, but also to tailor messaging that appeals to them."

TRAIL BLAZERS

One key question that constantly faces Cook is how to increase revenues per customer. He notes, "Microsoft CRM can show us tendencies and trends that will allow us to maximize our relationship with customers over time."

The Trail Blazers organization has a relatively fixed population to market tickets to in the Portland area. As a result, a large percentage of sales result from up-sell opportunities, such as parking, food, beverages, or merchandise. "A lot of what we do is progressive selling," says Cook. "If someone has season tickets, we can approach them with better seats as they become available, for example. With Microsoft Dynamics CRM we have a tool that empowers the sales staff to access the kind of information that allows them to be more proactive sellers."

BENEFITS

The solution has enabled a number of benefits such as system connectivity, sales force automation, and enhanced productivity.

- Sales Force Automation contributes to productivity gains:
 - > The workflow engine encodes processes that allow managers to enforce consistent procedures and streamline the sales process.
 - > The organization has seen marked productivity gains from the full customer view Microsoft Dynamics CRM gives its salespeople. For example, they can mine the data and use it in real time in their conversations with customers and prospects to improve the customer experience.

> The solution cuts down on the number of clicks and manual processes that the salespeople used to have to do to serve a customer or prospect. Shaving seconds off each of a salesperson's 50–100 calls per day improves productivity.

- Mobile data sharing strengthens customer relationships—Microsoft Dynamics CRM makes it easy for Dill's team to push CRM data to employees' hand-held devices during events, so that they can personalize their interactions with customers to increase the intimacy of the relationship with the Trail Blazers' organization. Moreover, as historical customer data is collected, the company will be able to push tailored messages directly to customers' devices at events.
- Ease of use ensures enterprise-wide adoption—The feedback from users has been positive. They adapted quickly to the familiar Microsoft look, feel, and screen navigation.
- Many-to-many relationship support improves efficiency—The new solution handles multiple ownership situations on accounts in a native way. This prevents salespeople from stepping on each other's toes and prevents infighting over commission issues.
- Scalability and flexibility protects investment against obsolescence—The flexibility, extensibility, and integration capabilities of the Microsoft Dynamics CRM platform means that Trail Blazers managers will be happy with this system far into the future.

"With Microsoft [Dynamics] CRM we have the right base tool in place to strengthen and grow our business." Chris Dill, Vice President & CIO, The Portland Trail Blazers

COMPANY

The Portland Trail Blazers
www.nba.com/blazers

VERTICAL INDUSTRY

Entertainment

SEGMENT

Small Business

COUNTRY/REGION

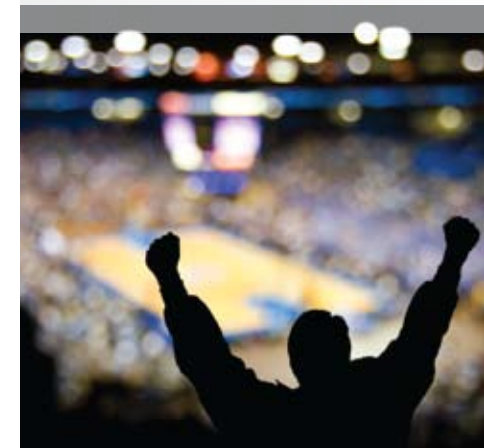
North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003
Microsoft Exchange Server 2003
Microsoft SQL Server 2005
Windows XP

MICROSOFT PARTNER

Ascentium Corporation
www.ascentium.com





Microsoft Dynamics CRM is a Perfect Prescription for Healing Productivity Ills for **HST**

HST develops and markets clinical and financial management software applications for the healthcare industry in the United States. The creation of in-house applications resulted in separate data silos for sales, marketing, finance, and operations. As the company grew, this led to operational inefficiencies that hampered interdepartmental communication and employee productivity. Managers evaluated six CRM solution alternatives and chose to deploy the Microsoft Dynamics CRM on-premise solution for marketing, sales, and customer service users. It met their criteria for a single data repository of customer information, Office Outlook integration, ease-of-use, and tools to enhance productivity.

BUSINESS NEEDS

Like most software development companies, managers made the decision to create their own sales and operations applications. While that served the company well 10 years ago, over time discrete data silos for sales, marketing, operations, and financial content were created, hampering internal efficiency and communication. The sales force, for example, needed to communicate with their service colleagues to ensure that a positive customer experience continued after the sale. And the service team needed to keep closer tabs on the status of outstanding issues. "In order to facilitate interdepartmental collaboration I knew that we needed to replace our legacy data silos with a centralized data source," says Karlene Ochoa, vice president of operations for HST.

The company's sales and service personnel use Microsoft Office Outlook heavily in their daily operations to close new sales and ensure customer satisfaction. These employees were also intimately familiar with the Office Outlook interface so any new solution would need to integrate well with it.

SOLUTION

Corporate managers began evaluating a number of alternatives. In addition to having a centralized database and seamless integration with Office Outlook, they wanted to offer their mobile sales force easy access to the CRM application. And they wanted to be able to quickly scale the number of users to 200. Based on these factors, managers selected the Microsoft Dynamics CRM on-premise solution.

The review process was made much easier because the company itself develops software applications for the healthcare industry. "We're using the same tools that Microsoft developers used to create Microsoft [Dynamics] CRM," explains Ochoa. "We felt that we had the expertise and experience to apply an in-depth analysis to whether the solution would fit well in our environment. In our experience, the back end, middle tier, and GUI will make or break an application if you want to scale it. The Microsoft solution passed those tests."

Another reason for favoring the solution was that Microsoft Dynamics CRM "allows more configuration than most products in the field right now," says Ochoa. "We're inserting data elements on our pages that include information specific to our industry. That was very easy to do right out of the box."

The company has a very mobile sales force that is looking to leverage the remote capabilities of the application. "Our salespeople love their laptops and we wanted to ensure they had online and offline access to data," explains Ochoa. "With Microsoft [Dynamics] CRM they now have access to a real-time status portal with information on customers, prospects and referrals."



The new solution replaced volumes of Office Excel spreadsheets, which sales reps had to manually reconcile each week. Time spent on this administrative task cut into time spent with prospects and customers. "A lot of our data was sitting on C drives versus a centralized location and that made version control impossible," remarks Ochoa. "It took many hours per week per sales person to update the information, assuming everyone did what they were supposed to do."

Marketers are using the marketing module to compile distribution lists based on specific criteria for newsletters, faxes, direct mail, and phone calls. "The marketing module makes it very easy to set up, track and tabulate results for campaigns," explains Ochoa. "We could have done that with our legacy systems but it would have been time prohibitive to extract, collect, and track that data."

The use of the Microsoft Dynamics CRM service module is just as vital to the company. "We have clients who call for software support," says Ochoa. "The service module generates case numbers and tracks an issue until it's resolved. That gives us and our customers the confidence that things are being handled. Our veteran help-desk people have adapted quickly to the service module and to date I literally haven't had one complaint from them about it."

BENEFITS

By leveraging the marketing, sales, and service modules of Microsoft Dynamics CRM, the company's managers have been able to garner a number of specific benefits.

- Centralized data repository—The solution provides a single location for customer data that may be accessed for sales, service, operations, finance, and marketing activities. This has eliminated the severe data silo problem managers previously grappled with.

- Visibility into accounts to capture more sales—The solution gave managers visibility into account data that allowed them to identify a marketing gap. The company had been ignoring new construction medical center prospects. Sales personnel are now working this segment, which represents an estimated \$1 million in potential revenues.
- Workflows boost employee productivity—Managers set up a workflow that automatically creates an opportunity and assigns it to a person for follow-up. The legacy manual process took 10 minutes to complete this task but the automated process takes less than a second.
- Enhanced customer satisfaction—Tracking and reporting on service issues resolves them faster. Moreover, service issue data can be aggregated to support the development of best practices to further the company's service reputation in the industry.
- Minimal customization and ease of maintenance save development costs—"The out-of-the-box CRM application is so easy to configure that I call it 'tailorization' versus what people normally associate with costly customization," explains Ochoa. "We can do that in house with minimal effort."
- 360-degree account view enables interdepartmental collaboration—Now that account data can be accessed in a single location, employees across departments can review, and act upon, all the data associated with a customer.
- Ease of use—The application is based on a familiar Microsoft platform that is very intuitive. Thus, user adoption is high while training time is minimal.

"We use the very tools to develop our own software that Microsoft used to create Microsoft [Dynamics] CRM. That helped us evaluate the many solutions we considered and choose Microsoft as the best solution for our company." Karlene Ochoa, Vice President of Operations, HST

COMPANY

HST
www.hstpathways.com

VERTICAL INDUSTRY

Healthcare

SEGMENT

Small Business—15 employees

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003/2007
Microsoft Exchange Server 2003
Microsoft SQL Server 2005
Windows XP and Windows Vista

MICROSOFT PARTNER

Workopia, Inc.
www.workopia.com





ING Invests in the Future with Microsoft Dynamics CRM to Yield More Effective Management for Vendors Worldwide

COMPANY

ING Groep N.V.
www.ing.com

VERTICAL INDUSTRY

Financial Services

SEGMENT

Large Business—about 119,000 employees

COUNTRY/REGION

Global

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003
Microsoft SQL Server 2005
Windows XP

MICROSOFT PARTNER

Microsoft Services
www.microsoft.com

SITUATION

ING Groep N.V. (AEX: ING) is a global-20 financial services company. The firm's managers work with a myriad of vendors to sustain annual revenues exceeding €73 billion. The company's Global Vendor Management (GVM) division sources and ensures the consistency and quality of vendor performance on behalf of ING business units and their management. "We needed a central repository of information about the vendors we track and negotiate with," says Fred Teekens, category and asset manager at ING Global Vendor Management. "And we needed an application that could automate workflows to standardize contract-related processes and ensure that they aligned with the services that employees are actually using."

SOLUTION

"Originally, we considered ERP solutions to support our processes for our Group," explains Teekens. "But as we evaluated workflows, we found that the Microsoft [Dynamics] CRM application matched our agile processes better than any of the others." Making the decision easier was the fact that other departments had already successfully implemented earlier versions of Microsoft Dynamics CRM. "There were a number of features in the new [Microsoft Dynamics] CRM 4.0 that were very attractive to us," says Teekens. "We liked being able to configure workflows to trigger activities and person-specific tasks. And with a presence in over 50 countries, the multi-tenancy and multi-lingual capabilities foster better collaboration."

BENEFITS

When GVM launches Microsoft Dynamics CRM, it will be used by 200 key managers company-wide. "They'll be able to submit a vendor request along with a business case to us," explains Teekens. "We'll use [Microsoft Dynamics] CRM to manage our relationships with vendors and be in a position to recommend quality companies that meet their criteria." Moreover, Microsoft Dynamics CRM will enable a feedback mechanism by which employees may rate the solutions implemented. "That will allow us to get a picture of a vendor who may do a perfect job in one part of the world but a lousy job in another," adds Teekens.

"Microsoft Dynamics CRM will be the tool we'll use to reach out to the entire vendor management community at ING. It will give us a significant advantage in how we effectively manage internal and external relationships to perform world-class procurement and vendor management across the globe." Fred Teekens, Category and Asset Manager, ING Global Vendor Management





MADA Communication Co. (Formally Arab Telecom Co.) Selects Microsoft Dynamics CRM to Drive Marketing, Sales and Support Activities

SITUATION

Kuwait-based MADA Communication Co. provides wireless data and Internet services to private businesses, governmental agencies, and individuals. The company is growing fast, and executives are applying technology to help it more quickly penetrate Middle-Eastern and African markets. "We needed to replace our homegrown CRM application with a more robust solution that could support multi-tenancy and multi-currency capabilities, along with the growth in our customer base," says Shahad Ibrahim, director of sales and marketing for MADA Communications Co. "And we wanted to ensure high service levels by leveraging CRM data across our enterprise to include our service department as well as sales and marketing."

SOLUTION

MADA managers evaluated responses to its CRM request for proposal. "We felt that the multi-tenancy, multi-currency, and workflow features in Microsoft [Dynamics] CRM fit our business model and growth plans the best," explains Ibrahim. "We rolled out the sales and service modules to 25 users first, then the marketing module in the following quarter." Given that members of MADA's sales staff spend most of their time on the road, they'll be heavy users of Microsoft Dynamics CRM offline reporting and Microsoft Office Outlook offline background syncing capabilities.

BENEFITS

Ibrahim acknowledges that in the commoditized world of telecommunications, superior customer service is critical to differentiating the company from competitors. "The ultimate goal of implementing Microsoft [Dynamics] CRM is to enhance the quality of the service we offer customers," explains Ibrahim. "That allows us to offer better service-level agreements and deliver upon them." Additionally, due to the collaboration-supporting functionality of Microsoft Dynamics CRM, managers believe they can shorten their sales cycle to generate more sales.

"Microsoft Dynamics CRM will be a key tool in helping us meet our sales, support, and marketing growth objectives throughout the Middle East and Africa."

Shahad Ibrahim, Director of Sales and Marketing, MADA Communication Co.

COMPANY

MADA Communication Co.
www.mada.com.kw

VERTICAL INDUSTRY

Telecommunications

SEGMENT

Small Business-40 employees

COUNTRY/REGION

Kuwait

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003
Microsoft Exchange Server 2003
Microsoft SQL Server 2005
Windows XP Professional

MICROSOFT PARTNER

BlueLink Solutions
www.i-bluelink.net





Multinational Building Company Links Up with Microsoft Dynamics CRM to Improve Workflow and Facilitate Focus on Customer-centric Service

The Linc Group is an international company operating in 45 states and six countries. Its 249 physical locations plus 138 franchise locations provide infrastructure and technical services to commercial/industrial facility clients. As a service business, building a book of clients through prospecting, as well as retaining current customers, are key to the company's long-term success. To optimize the success of company and franchisee offices, the firm implemented Microsoft Dynamics CRM version 1.2 and most recently 3.0. When the latest version became available, managers gave it a hard look. Factors that convinced them to upgrade included enhanced workflow features, and the new multi-tenancy, multi-language, and multi-currency capabilities.

BUSINESS NEEDS

The Linc Group's 3,600 employees serve the infrastructure and technical service needs of commercial/industrial facilities customers such as educational, manufacturing, and office facilities. Operating under the philosophy that providing service locally is the most efficient and customer-satisfying delivery model, the company has established 249 physical branches in 45 states and six countries. This business model has been very successful. So much so that the firm has licensed it to 138 franchisees.

To build lucrative businesses, office managers have focused heavily on locating new business and retaining the clients they have. "Our revenues depend on the relationships we have with customers," says Greg Lush, CIO for The Linc Group. "There are a finite number of people in any geographic area so our offices need to optimize their touches, whether it's with a customer or a prospect."

SOLUTION

That reality led managers to implement an on-premise CRM solution. They ruled out the Siebel CRM alternative as being too complicated for their user base. That resulted in the selection and deployment of Microsoft Dynamics CRM version 3.0. "One of the huge selling points of Microsoft [Dynamics] CRM is that it nests within the Office Outlook client," recalls Lush. "That gives us a user experience that is very familiar to our Microsoft application users."

When the latest version of Microsoft Dynamics CRM became available, managers evaluated it against their future needs. This led them to upgrade to the latest version of the solution. "The learning curve to upgrade from 3.0 isn't that big," explains Lush. "We also liked that end users could configure workflows and that multi-tenancy was available to allow us to operate a single instance of the application."

To capture operational efficiencies, the company provides IT resources centrally to its corporate and franchisee offices. Initially, managers rolled out Microsoft Dynamics CRM 3.0 and made it available to U.S.-based offices. With the multi-tenancy, multi-language, multi-currency features available in version 4.0, the firm will extend the implementation of the solution to international locations.

"We consider CRM to be a core competency for our business and have developed a multi-year deployment strategy to integrate it more deeply in our corporate culture," explains Lush. "We will make use of the multi-language and multi-currency features in places like Iraq, where we provide support services to the Department of Defense and Department of State. Local employees will need to use Microsoft Dynamics CRM in their own language and currencies to support our operations in Korea, Egypt, and Europe as well."



The company is using Microsoft Dynamics CRM to improve the performance of managers and employees. "The reporting capabilities allow managers to cross-check recorded activities against what their salespeople are telling them," says Lush. "The purpose is not to baby-sit our employees but rather to hold them accountable against specific objectives. When you tie in workflows to provide automated prospecting, follow-up, and account retention activities, you have an extremely powerful tool to help them perform better."

Lush's team will make full use of the marketing, sales, and service module functionality available in the solution. Branch office managers will use the marketing module to implement marketing campaigns. "Our business has many seasonal activities," explains Lush. "So, for example, in the fall, office managers will be able to create marketing lists to send out a 'get ready for winter' mailer. They'll use the automation features to create reminders throughout the year for similar campaigns."

Employees use the service module to manage work orders of subcontractors the company hires to provide building service and maintenance.

BENEFITS

The multi-tenancy features of the solution allow The Linc Group to tailor the CRM experience for each of its offices and franchisees around the world.

- Multi-currency, multi-language capabilities facilitate global expansion—"Selling to the government is different than business-to-business sales," says Lush. "An opportunity plus developing relationships add up to sales."

- The new Microsoft [Dynamics] CRM features will allow us to be as effective overseas for our government clients as we've been with the solution here at home."
- Extendable platform provides tool to integrate fully with corporate systems—"Microsoft Dynamics CRM is so open and flexible that it can easily connect to our other systems," explains Lush. "I think Microsoft intended it to be a platform as much as an application and it shows like that. We can really start to highly integrate it with Microsoft SharePoint® and Microsoft Dynamics AX and our data warehouse."
- Workflows help improve productivity—"The solution gives visibility into what our salespeople are doing," states Lush. "That motivates our people to enter data into the system. Now we very easily use Microsoft [Dynamics] CRM to hook workflows into that to provide a tool so they can work a proven system. They visit a prospect, for instance, and enter the results into Microsoft Dynamics CRM, which automatically schedules a templated e-mail to be sent in three days for follow-up. By automating a lot of the follow-up, they can give a personal touch to our services. And expand our business while retaining more customers."
- Microsoft Dynamics CRM shifts focus to customers—"Because the services we provide are intangible, our business comes down to how well we can engage with and stay in touch with our customers," says Lush. "Microsoft [Dynamics] CRM delivers the customer-centric view we need to be very successful. The dashboard feature, for example, puts the focus on opportunities, quotes, and service. It helps strip away the 'what's in my inbox to deal with' mentality to center proactively on what we should be doing to grow our business and better serve our clients."

"The true value of Microsoft [Dynamics] CRM is about how successful the tool can make employees in their jobs." Greg Lush, Chief Information Officer, The Linc Group

COMPANY

The Linc Group
www.thelincgroup.com

VERTICAL INDUSTRY

HVAC Facility Services

SEGMENT

Large Business

COUNTRY/REGION

North America

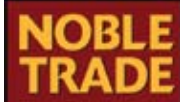
SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003 and 2007
Microsoft Exchange Server 2003
Microsoft SQL Server 2000 and 2005
Windows XP

MICROSOFT PARTNER

Hitachi Consulting
www.hitachiconsulting.com





Noble Trade Builds Employee Productivity and Customer Satisfaction with Microsoft Dynamics CRM Live

This Canadian company is a wholesale distributor of plumbing, heating, and industrial materials. Employees at 22 locations serve the needs of residential, commercial, and industrial contractors. Allegiances can shift among these clients and sales can go to competitors if personnel don't keep a close eye on their business relationships. However, the company lacked a comprehensive CRM tool to achieve this. Customer data resided with individuals in their heads, Rolodexes, and files. Collaboration between sales and customer service groups was inefficient, relying upon e-mail and phone communications. And while corporate systems collected and hosted critical client product-purchase history, full account profiles and customer activity history was being lost. To address these challenges, managers standardized on Microsoft Dynamics CRM Live.

BUSINESS NEEDS

Noble Trade is a wholesale distributor of plumbing, heating, and industrial materials to residential, commercial, and industrial contractors. The Canadian firm has 19 locations. Two key factors contribute to the success of capturing and keeping clients: service and pricing. As dedicated as the firm's 317 employees are, there were limits to the efficiency that sales and service personnel could achieve with manual tools.

At the system level, the company lacked a viable CRM solution. Customer data resided on users' local hard drives and in their heads. Communications by e-mail and phone between sales and service people were inefficient. Lacking any sales force automation tools, the firm's salespeople were subject to manual processes. "We wanted to streamline the passing on of information from outside sales to inside sales," explains Deb Thornton, CRM implementation specialist for Noble Trade. "There was no consistent method of task assignment and follow-up, sometimes causing the duplication

of efforts. We recognized the need to implement workflows for sales and service activities."

With no CRM system in place, salespeople also lacked visibility into critical customer activity and purchase history data. Legacy tools made proactively accessing and using purchase data difficult. This in turn limited salespeople's ability to identify trends that could help them increase sales or counter competitors' inroads.

SOLUTION

Company managers began their research of a CRM solution by reviewing white papers. This led to phone interviews and demonstrations of six alternatives. From these, they narrowed them down to Sage CRM, Salesforce.com, and Microsoft Dynamics CRM Live and completed a hands-on evaluation of each.

Reviewers considered several key criteria in their selection process. The ease-of-use of the application was important to managers because they recognized that if a CRM solution was cumbersome their salespeople would reject it. The second criterion was full functionality. "We wanted to use the solution out of the box to support marketing, sales, and service systems," says Thornton. Managers also wanted to use workflows to streamline and automate processes for their sales and services departments.

From an IT perspective, managers mandated a hosted solution so that the company's IT resources would not be burdened. Moreover, the final CRM choice would need to fit with the firm's Microsoft Office Outlook and Microsoft Office platforms. When managers finished weighing the options against these requirements, they selected Microsoft Dynamics CRM Live.



The solution implementation will follow a phased timetable, beginning with the use of the sales module followed by the rollout of marketing and service functionality. "We're customizing an account profile tab to utilize only fields that we want our salespeople to see and fill out," remarks Thornton.

"We don't have a typical sales pipeline," explains Thornton. "Our clients are repeat customers and we created a one-year sales cycle to service those accounts. That includes things like frequent segment and commodity reviews to ensure we're in sync with the market and retain customers. We'll use Microsoft [Dynamics] CRM to automate reminders and activities for each of the touchpoints throughout the year."

Over the next 12 months, Thornton sees the company's user base growing to as many as 50 people, with 80 percent of licenses dedicated to salespeople and 20 percent to management and administration personnel. Additionally the multi-lingual, multi-currency capabilities of Microsoft Dynamics CRM dovetails nicely with the firm's corporate headquarters in Quebec.

Executives plan to integrate the new solution with the company's very robust project quotation software application as well as access data stored in an SQL Server database.

BENEFITS

Microsoft Dynamics CRM Live solves Noble Trade's major CRM challenges and delivers a single platform to drive sales and service productivity and collaboration.

- New solution fuels easy access to, and use of, trending data to retain customers—Salespeople can create ad hoc reports that access customer history data in the company's SQL Server database to identify trends. By gaining granular visibility into account purchases, they can respond more quickly to changes in the marketplace and proactively engage customers.
- Sales force automation tools enforce best practices and increase productivity—With Microsoft Dynamics CRM Live, non-programmer managers can place their best practices into workflows. For example, workflows will provide automated tasks and reminders throughout the year for each touchpoint in the firm's annual sales cycle. This delivers consistent sales activity across the sales force using the company's proven process.
- The Microsoft Dynamics CRM hosted implementation sidesteps the use of internal IT resources and provides a standardized platform for the enterprise—Managers avoid solution implementation delays by not having to get on their IT department's project list. As the firm acquires new companies and experiences further organic growth, the new solution will prevent the proliferation of data silos by providing a standardized CRM platform for new employees.
- Sales and service collaboration increases customer satisfaction—By centrally storing account data, sales and service employees can access it so that they interact intelligently with customers. Salespeople can engage customers while being fully aware of service issues. Moreover, they'll be more targeted in their sales activities by knowing what stage a construction project is in—and accordingly what specific products customers will need.

"The full marketing, sales, and service functionality in Microsoft [Dynamics] CRM [Live] ensures that we cover all the bases with our customers to increase our retention rate."

Deb Thornton, CRM Implementation Specialist, Noble Trade

COMPANY

Noble Trade
www.nobletrade.ca

VERTICAL INDUSTRY

Wholesale plumbing, heating, industrial materials supplier

SEGMENT

Small Business—over 300 employees

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live
Windows Server 2000/2003
Microsoft Office 2003
Microsoft Exchange Server 2003
Microsoft SQL Server 2000, upgrading to 2005
Windows XP

MICROSOFT PARTNER

Brodie Computes Inc.
www.brodie.com





Doosan Heavy Industries America Corporation Equips to Win More Business with Microsoft Dynamics CRM Live

COMPANY

Doosan Heavy Industries
America Corporation
www.doosan.com

VERTICAL INDUSTRY

Engineering Products and Services

SEGMENT

Small Business

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live
Microsoft Office 2003
Windows XP

MICROSOFT PARTNER

AppSolute Consulting Group, LLC
www.appsolute.com

SITUATION

This industrial company provides infrastructure-development services, boilers, and parts primarily to the power industry in North America. Marketers at the company's New Jersey office wanted to implement a CRM tool to enhance their productivity beyond what Microsoft Office Outlook alone could provide. Contact and customer data resided on local hard drives. Moreover, "Each of us had a different version of our project information," says Annie Suarez, marketing coordinator for Doosan in New Jersey. "And that caused problems. If we're not up to speed on a project we can lose a \$2 million contract."

SOLUTION

Managers narrowed their search for a CRM solution down to Salesforce.com and Microsoft Dynamics CRM Live. "We chose Microsoft Dynamics CRM Live because it fully integrates with Office Outlook and our other Office applications," recalls Suarez. "It's easy for non-technical people to use, the price was right, and the Live version doesn't place an IT burden on our office."

Suarez's team easily tailored and added many fields related to their industry, from plant megawatt size available through simple drop-down lists to project information data. They also customized the way opportunities are handled to match the company's processes and set up a workflow that notifies designated employees when a project has been updated.

BENEFITS

The new solution met the company's need for a centralized repository of CRM data. Suarez used Microsoft Dynamics CRM Live to create a library of Doosan files that employees can use, including meeting notes and market research reports. "Our contact and project data is well organized and easy for me to search and find files rather than rummaging around my computer," notes Suarez. "We'll be able to track every project we're bidding on now and update and access project information quickly. Having a single place for all our files ensures we all have access to one version of our project data."

"We selected Microsoft Dynamics CRM Live because it's easy to use and we could deploy it without using our IT resources." Annie Suarez, Marketing Coordinator, Doosan Heavy Industries America Corp.





Microsoft Employs Single CRM Platform to Build One of the World's Largest Multi-language Service Solutions

SITUATION

More than six thousand Microsoft Commercial Service and Support (CSS) representatives field 1.2 million service requests per year. Many of these are complex issues from savvy technology users and repeat callers. CSS representatives have been using a 12-year old legacy Clarify system to provide support and recently began exploring ways to improve customer satisfaction and shorten issue resolution times. The Clarify solution required seven instances to support commercial service activities globally. This resulted in separate data silos that made it difficult to share information among agents and managers. The legacy platform also lacked the multi-language capabilities that division executives needed to support the company's global language support and services model. These challenges led managers to seek a platform that would help Microsoft provide even more effective support to customers anywhere, at any time.

SOLUTION

Managers applied a very formal selection process based on their business drivers and technical criteria. "We needed a platform that was extensible, would integrate easily with other systems in our environment, included robust workflow capabilities and could support our global 24/7 operations," says Brett Dean, principal solutions manager for Microsoft. "We selected Microsoft Dynamics CRM over the SAP CRM solution we put it up against for these reasons and because we could bring it to market much faster." Managers will use the multi-tenancy features of the new solution to consolidate seven instances of their service support database down to one. Moreover, they'll utilize the multi-language capability to support worldwide service operations.

BENEFITS

The solution's multi-tenancy feature allows IT managers to implement and use a single CRM platform. In turn, employees across the enterprise will gain a global view of customers. "The multi-language feature allows us to provide more effective service to multinational companies by empowering service personnel to speak to customers in their own language from the first call through resolution," explains Dean. By introducing best-practices workflows in tandem with in-language support, Dean expects service agent productivity and effectiveness to increase markedly. From an IT perspective, "The platform is so flexible and extensible that we can easily achieve at least 12 integration points with other systems and applications inside Microsoft," says Dean.

"The Microsoft Dynamics CRM workflow and multi-language features will help us markedly improve upon our key service metrics to deliver a significant return on our investment."

Brett Dean, Principal Solutions Manager, Microsoft

COMPANY

Microsoft
www.microsoft.com

VERTICAL INDUSTRY

Software

SEGMENT

Large Business

COUNTRY/REGION

North America
APAC
EMEA
LATAM

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003R2 – 64bit
Microsoft Office 2007 Professional
Microsoft Exchange Server 2007 Enterprise
Microsoft SQL Server 2005 Enterprise
Windows XP SP2 and Windows Vista
Microsoft BizTalk® Server 2006
Microsoft .NET Framework v3.5





California Teachers Association Learns Lesson(s) as Service Improves For 350,000 Members—with Microsoft Dynamics CRM

The California Teachers Association (CTA) serves 350,000 members. It provides a full range of offerings, including the improvement of teaching conditions, representation in the political arena, insurance, and education-oriented publications. The IT environment to support these members is complex and highly integrated. A CRM platform has been an essential building block of that environment, integrating with Microsoft Office SharePoint and Microsoft Office 2007 among other heterogeneous applications. Managers issued an RFP and selected Microsoft Dynamics CRM from a short list of four alternatives. The solution ensures the accurate dissemination of member data and allows marketers to mine and integrate data across other systems in the enterprise.

BUSINESS NEEDS

The California Teachers Association is very large, with 700 employees and 350,000 education professionals across the state. Signing up new members and retaining current ones are critical activities to the success of the association. These functions rely upon a complex IT environment to capture and manipulate data. "Our whole system is centered on our membership base," says Thames Kral, CIO for the CTA. "We have a panoply of systems that combine to capture, move around, and push data to our members and employees."

These systems include the heavy use of Microsoft SharePoint Server to provide a clearinghouse for electronic documents. Another key platform is the Microsoft Identity Integration Server that stores and integrates membership identity information for the association. As the environment grew, managers decided that it was time to add a CRM solution to better serve its large membership base.

SOLUTION

IT managers broke down their CRM solution alternatives into three groups. The first group consisted of applications specifically built for associations. "There are probably 100 decent membership-tracking applications out there," explains Kral. The second category was to build a platform in house. "We could have built the hooks we wanted and written the integration engines ourselves," says Kral. The third alternative was Microsoft Dynamics CRM.

With a list of potential applications in hand, decision makers ran an internal exercise. States Kral, "We asked ourselves, 'If there was an ideal platform out there, what would it look like?' That formed the basis for our requirements." At the top of the criteria list was a highly flexible CRM solution that could integrate well with the CTA's many existing systems, including Microsoft Office. Also on the list was extensibility so that CTA programmers could easily build upon the system over time to add more functionality that would in turn increase the association's value to members.



With 350,000 members to keep happy, the selection of a CRM solution was a serious matter. “The reason we bet on Microsoft is that we feel they are doing the right thing in the industry,” notes Kral. “Their unification strategy is spot-on. To me, they’re the player you can count on to be there long term.”

That strategy was a driver in creating a flexible CRM platform. “One of the reasons that we went with Microsoft [Dynamics] CRM versus the other alternatives we considered is that it will be a lot less expensive and significantly more efficient to build upon and support it going forward,” recalls Kral. “You can have the best build out in the world but if you can’t maintain it easily you’re dead in six months. We especially like the flexibility of the Microsoft [Dynamics] CRM platform that we’re upgrading to now.” In fact, the migration from 3.0 to 4.0 has been so smooth that Kral has already scheduled follow-on projects to take place once this phase is complete.

BENEFITS

Microsoft Dynamics CRM is a core platform CTA needs to provide a 360-degree view of its 350,000 members.

- Member data repository provides a key component of the association’s environment—“When we pull up a member, based on membership status and security, we’re able to see everything about them, whether they’re active on the political side of our association, the claims side or some other area,” says Kral. “CRM is a key system contributing data to our single view of the entire system. For an organization where its entire livelihood revolves around members, that’s critical.”

- Single view of the truth ensures trust, contributes to retention —“It doesn’t matter whether we’re sending information to a PDA or a CRM screen or a membership screen in a different system, the beautiful thing is that they are all displaying the same pieces of information coming from a central location,” explains Kral. “We can’t have an application displaying incorrect benefit information because it starts a forest fire. CRM helps us achieve a high level of accuracy that maintains our credibility with members.”
- CRM solution delivers productivity-enhancing tools— When employees from different departments update a member’s record, data is recorded to the same spot within Microsoft Dynamics CRM. “We don’t have different people keying in information three times,” says Kral. “We’re going to go paperless through integration with SharePoint. Employees will be able to access electronic insurance documents from their desktop, for example, versus having to walk to three different filing cabinets. That will be a time saver, and provide a higher level of service.”

“Microsoft [Dynamics] CRM is a core application to significantly enhance our relationships with, and service to, our 350,000 members.” Thames Kral, CIO, California Teachers Association

COMPANY

California Teachers Association
www.cta.org

VERTICAL INDUSTRY

Professional organization

SEGMENT

Medium Business—700 employees

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2007
Microsoft Exchange Server 2003
Microsoft SQL Server 2005
Windows XP SP2
Microsoft Office SharePoint Server 2007
Microsoft BizTalk 2006-R2
MIIS 2003

MICROSOFT PARTNER

Allin Consulting
www.allin.com





RAYMOND JAMES®

Raymond James Financial Reaps Dividends from Investment in Enterprise-wide Microsoft Dynamics CRM Solution

The company's 3,000 financial advisors specialize in helping clients preserve and protect their wealth. Two thousand of these advisors are independent contractors working out of their own offices. Building and maintaining trust with clients is essential to successfully growing their practices. Hence, advisors adopted a wide array of CRM tools to help them achieve this goal. As a result, the company had no uniform means to document and access customer data. Moreover, the company had difficulty providing global support to its advisors because it lacked a viable tool to codify and distribute best-practice processes. To overcome these challenges, managers chose Microsoft Dynamics CRM.

BUSINESS NEEDS

Raymond James relies upon a mix of employees and independent contractors to serve as financial advisors. Each one of them runs their own practice, which includes prospecting, serving, and retaining clients. Because establishing and strengthening relationships are so critical to differentiating themselves, the use of discrete contact databases was commonplace. These were a heterogeneous mix of applications including ACT!, GoldMine, and Juncture CRM.

"The financial advisors had no uniform way to enter data," recalls Shawn Tabor, technology product manager for CRM at Raymond James Financial. "We had no way to assist them with regulatory procedures and compliance issues. And we had difficulty distributing best practices to such a disparate group through our existing tools."

That led company managers to search for a CRM platform that could address these issues as well as allow independent contractors the flexibility to customize it to suit their business needs.

SOLUTION

Tabor played a central role in the search for a CRM solution. "We used a formal RFP [request for proposal] process and looked at 14 different firms." From there, the CRM team whittled the choices to two, SalesLogix and Microsoft Dynamics CRM. "We had a bakeoff between the two with 4,000 of our users and they chose Microsoft Dynamics CRM overwhelmingly," says Tabor. "They liked how it integrated with Office Outlook, their main daily work tool. And they loved the interface, which requires very little time to master."

The solution's ease of integration earned favor among IT personnel too. "Microsoft [Dynamics] CRM allows us to provide a single platform to thousands of our independent contractors while leveraging our .NET infrastructure and other Microsoft platforms like SharePoint," explains Tabor.

The company initially deployed Microsoft Dynamics CRM 3.0 but is now upgrading to Microsoft Dynamics CRM. "We'll be using the multi-tenancy feature to implement our branch-office CRM initiative," says Tabor. "That will reduce our hardware expenditures by placing multiple instances on one box and help us gain efficiencies by leveraging the integration between instances."

CRM specialists will roll out the marketing module's functionality to advisors in a later implementation phase. "We'll use it to develop appropriate marketing campaigns for specific products based on ZIP codes and socioeconomic data," states Tabor.

The Microsoft Dynamics CRM sales module will be integral to the overall financial advisory process. "It will provide an effective tool to guide our advisors in managing their client relations, doing effective follow-up, and providing reminders," explains Tabor.

RAYMOND JAMES®

The company will use the service module to handle customer issues. Branch office users can create their own incident and track its progress. "They'll be able to proactively use that information in Microsoft [Dynamics] CRM, rather than reactively waiting on the legacy process to receive an e-mail or phone call," offers Tabor. "That will provide a win-win for the advisor and the client."

To date, Tabor has extensively tested the workflows in Microsoft Dynamics CRM. "It is so much more user-friendly on the technical level that users can create and administer them without the help of programmers. I could tell immediately that it was more robust and functional than the previous version."

BENEFITS

Microsoft Dynamics CRM provides the features, flexibility, and customer detail to optimize the effectiveness of financial advisors in deepening and capitalizing on their relationships with prospects and customers.

- A standardized CRM platform is cost-effective and efficient:
 - > The solution's multi-tenancy feature allows Raymond James IT managers to implement its use across diverse user populations with minimal capital expenses and ongoing maintenance.
 - > The company benefits by providing a cost-effective, centrally hosted and accessed CRM solution. Advisors benefit, by accessing a robust CRM solution that allows them to tailor the application to suit their tastes, experience, and competitive advantages.

- The creation of a best-practices workflow library raises advisor performance—Managers will implement workflow automation to eliminate administrative tasks and ensure that advisors of all skill levels can take advantage of best practices. Microsoft Dynamics CRM allows nonprogrammers to easily build a workflow library that advisors can then modify on their own to suit their business needs. So the newest advisor can use the same best practices that highly successful advisors use. Distributing those tools across the advisor population will boost the overall performance of that group.
- A superior tool to build better relationships with clients:
 - > Through the solution's marketing and sales module automation features, advisors will be able to increase the number of tailored touches they have with clients without burying them under administrative work.
 - > Raymond James marketers will use the solution to develop tailored marketing campaigns for specific financial products and provide advisors parameters to create highly targeted marketing lists. With marketing personnel providing the campaign strategy and planning, advisors can focus on the execution of those plans.

"Microsoft [Dynamics] CRM will help us increase our advisors' touch points with their customers and allow us to push best-practices workflows to them to improve their effectiveness."

Shawn Tabor, Technology Product Manager for CRM, Raymond James Financial

COMPANY

Raymond James Financial
www.raymondjames.com

VERTICAL INDUSTRY

Financial Services

SEGMENT

Large Business

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003/2007
Microsoft Exchange Server 2003
Microsoft SQL Server 2005
Windows XP

MICROSOFT PARTNER

Microsoft
www.microsoft.com





Heidtman Steel Products Rides Cutting Edge with Economical Hosted Microsoft Dynamics CRM Solution That Strengthen Business Intelligence

SITUATION

The company's 850 employees work out of eight locations in five states. The firm's three operating divisions lacked visibility into the activities of each other. "This prevented us from effectively coordinating our efforts to win business while adding the risk that one division might underbid a sister division on a contract," says Mike Kruse, vice president of marketing at Heidtman Steel Products. This problem was compounded by salespeople who inefficiently used individual or paper systems to manage their contacts and sales processes. This led to a disjointed sales process in which employees would contact the same national account multiple times instead of employing an integrated, strategically guided approach.

SOLUTION

After considering solutions from four vendors managers decided that the economical Microsoft Dynamics CRM partner-hosted solution best met their needs. "Microsoft Dynamics CRM was the simplest and most straightforward solution we evaluated," explains Kruse. "It can be easily configured to our business environment and integrates well with Microsoft Office and Office Outlook." Twenty-four employees in one division use the sales module to log customer information, including activity on existing contracts and project bid data. Sales and service personnel access pricing data to ensure consistency across communications. Managers use the solution to create reports, then analyze and act upon this data.

BENEFITS

The hosted solution, by partner Axonom, allowed managers to quickly and cost-effectively implement a CRM tool to its users. "We still have the option to bring Microsoft Dynamics CRM in house down the road if we want to," says Kruse. "For now, the solution provides a centralized customer data repository that informs employees about what is happening on an account. When the solution is rolled out to all three of the company's divisions, data visibility will eliminate the risk of one department underbidding another. "Having pricing information accessible to both our inside and outside sales people will significantly reduce pricing disputes and present a consistent message to customers," says Kruse. Kruse also sees the new solution as a valuable tool to gain business intelligence. Sales managers can review customer interactions across an account and strategically engage opportunities based on profit margin criteria.

"Microsoft [Dynamics] CRM has definitely delivered the customer data visibility we needed in our company to increase our efficiency and effectiveness in landing new business."

Mike Kruse, Vice President of Marketing, Heidtman Steel Products

COMPANY

Heidtman Steel Products
www.heidtman.com

VERTICAL INDUSTRY

Steel processing and sales

SEGMENT

Medium Business-850 employees

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
(partner-hosted deployment)
Windows Server 2003 Standard
and Enterprise
Microsoft Office XP, 2000, 2002, 2003
and 2007 Professional Editions
Microsoft Exchange Server 2003 Enterprise
Microsoft SQL Server 2000 and 2005,
Standard and Enterprise Editions
Windows 2000, Windows XP, and
Windows Vista

MICROSOFT PARTNER

Axonom
www.axonom.com





Stanley Associates' Mission-critical Hosted CRM Solution Improves Effectiveness of Business Intelligence and Sales Employees

SITUATION

Stanley, Inc. (NYSE: SXE) delivers systems integration and professional services to the U.S. federal government. Stanley's business development professionals collect the latest information on government accounts to help win new business. However, the intensive use of e-mail and spreadsheets to manually collect, distribute, and share this information was time consuming. By the time executives reviewed reports, portions of the data were out of date. This hampered the managers' ability to effectively pursue appropriate opportunities. Additionally, the company lacked the productivity-enhancing technology to manage and develop opportunities and contacts. These challenges triggered the search for a CRM solution.

SOLUTION

Managers consulted with key personnel to develop a list of requirements. "We wanted the CRM solution to be easily configurable and flexible to integrate with our current processes," recalls Becca Bushong, business intelligence lead for Stanley. "Our criteria included total cost of ownership and weighed hosted versus on-premise options." That led the CRM search committee to issue a request for proposal, which garnered three vendor responses. Of the three, they selected Microsoft Dynamics CRM Live. "The hosted solution fit our needs perfectly. We also liked that it is very easy to use, integrates seamlessly with Office Outlook, and includes user-configurable workflows."

BENEFITS

The hosted solution provides the real-time data availability that executives need to make accurate and timely decisions. Moreover, the company's IT department is not responsible for its implementation or ongoing maintenance. For example, they don't need to perform updates or provide infrastructure to store and back up the data. Additionally, managers will utilize the user-configurable workflows available in the solution to automate opportunity management administrative tasks and standardize processes to ensure compliance with corporate policies.

"The Microsoft [Dynamics] CRM [Live] solution takes the IT support burden off of our employees while delivering real-time data and workflow capabilities that will improve our effectiveness."

Becca Bushong, Business Intelligence Lead, Stanley

COMPANY

Stanley, Inc. (NYSE: SXE)
www.stanleyassociates.com

VERTICAL INDUSTRY

Systems integration consulting

SEGMENT

Large Business—3,500 employees

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live
Microsoft Office 2003 SP1 (ver 11)
Windows XP SP2

MICROSOFT PARTNER

Hitachi Consulting
www.hitachiconsulting.com





Microsoft Dynamics CRM Engineers Optimal Business Development for CH2M Hill

CH2M HILL's multiple CRM and home-grown opportunity tracking systems resulted in a diverse, disconnected set of applications for supporting business development. These islands of data drove redundancy in data entry and data inconsistency, and could not provide a single global view for managing strategic pursuits/accounts across the enterprise. Management engaged technology research firm Gartner Consulting to discuss CRM needs and objectives, and to get suggestions about potential vendor solutions. CH2M HILL's selection committee narrowed the choices to four vendors, and ultimately selected Microsoft Dynamics CRM.

BUSINESS NEEDS

CH2M HILL is an engineering, construction, and operations company that employs 23,000 people worldwide. The organization is composed of 12 business units that are staffed with dedicated business development resources. Over the years, the business units adopted various tools and systems to support their sales activities. The internal mix of CRM applications included SalesLogix, Salesforce.com, and a variety of home-grown sales opportunity tracking tools. These disparate systems created data silos that made it difficult to gain an enterprise-view of sales opportunities. There was also no centralized customer or contact management system, resulting in uncoordinated selling by multiple business units into strategic accounts. Consequently, it became a labor-intensive process to provide aggregated opportunity data to CH2M HILL decision makers, and a challenge for them to make timely, informed decisions around the new business portfolio.

"These separate systems made it difficult for us to leverage efficiencies in selling our full-service portfolio," says Thomas Doerr, project delivery director in Corporate Marketing and Communications. "We needed to bring our CRM processes and tools under one umbrella to provide the strategic coherence necessary to increase sales opportunities."

SOLUTION

Armed with a list of criteria and a clear idea of where they wanted to take their business development infrastructure, CH2M HILL management consulted with Gartner's CRM experts. Based on their suggestions, as well as input from key CH2M HILL executives, a request for information was sent to five CRM vendors. Of the respondents, two eventually went head-to-head to compete for CH2M HILL's business. The company contracted with both vendors and assigned a team to test both solutions. "We looked under the hood of both products, did detailed use-case evaluations, and performed some system configurations and integration," recalls Doerr. "Our detailed analysis led to our selection of Microsoft Dynamics CRM. The 10-year TCO [total cost of ownership] was a major differentiator. Ease of use and the integration with our existing SharePoint, Office Outlook, and Microsoft Office applications was also a very strong factor in its favor. These combined advantages, coupled with the ability to leverage our existing IT infrastructure, made it a simple choice for our committee."



Other deciding features included the capability to support a large-scale rollout to the company's 12 business units. "Because we're a global organization, the multi-currency capabilities of [Microsoft Dynamics] CRM were very important to us as well" explains Doerr.

To create an enterprise-wide system, CH2M HILL management selected the on-premise deployment option. Business development personnel will make use of the sales module features primarily. "Effectively tracking and managing key accounts and opportunities is a core success factor for our business development," says Doerr. "Microsoft [Dynamics] CRM and the SharePoint integration support this goal. The system also organizes data so that there is clear ownership and accountability."

The lead-management system in Microsoft Dynamics CRM is new to CH2M HILL. "The notion that a lead is worked in the system until it becomes a viable contact, account, and/or opportunity is a good way to drive positive results," states Doerr. "It may take time for that idea to take hold, but it will be much easier through the structured approach the new solution provides."

The next link in the chain is the company's handling of opportunities. "We're doing the most customization around this entity," says Doerr. "We're integrating our business rules and configuring the solution to provide common metrics across the enterprise. We'll be able to produce good sales forecasting from that data, and provide dashboard views to help our business development staff track sales performance."

Once the solution is fully integrated into the firm's business development operations, 2,500 users will be accessing the system.

BENEFITS

Ultimately, the solution supports the enterprise's business development strategy for growing the right clients, and increasing opportunity evaluation and selectivity.

- Account and contact visibility boost effectiveness—The new solution will significantly enhance CH2M HILL's business groups' ability to sell their services across accounts and to make more informed decisions around opportunities. This replaces legacy solutions that resulted in data silos.
- Historical data enables ROI analyses—By using Microsoft Dynamics CRM to capture sales forecasting and business development costs, CH2M HILL management will gain better visibility into account profitability. It was difficult to create ROI reports through the legacy systems.
- Standardized tool fuels future growth—The company is poised to accelerate its growth and is implementing new standards, processes, and tools to efficiently scale operations. Implementing Microsoft Dynamics CRM will allow CH2M HILL management to drive sales and marketing efficiencies across the firm's 12 business units.
- Microsoft platform leverages existing infrastructure and usability—Microsoft Dynamics CRM integrates well with the company's installed Microsoft Office, Office Outlook, and SharePoint platforms. A familiar and intuitive interface will reduce training time and speed user adoption.

"When the [Microsoft Dynamics CRM deployment is complete, we will have achieved the initial goal of providing an enterprise view into our accounts and opportunities. This breaks down business group barriers and provides a single platform for selling our full-service portfolio."

Thomas Doerr, Project Delivery Director in Corporate Marketing and Communications, CH2M HILL

COMPANY
CH2M HILL
www.ch2m.com

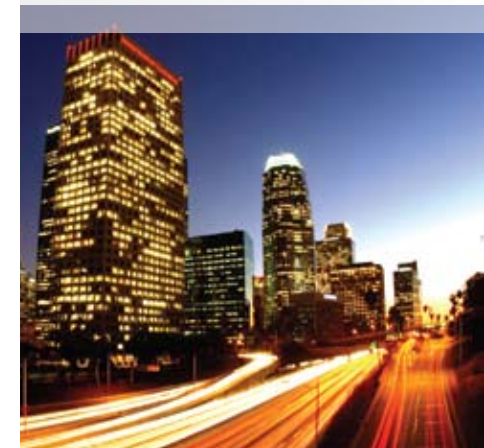
VERTICAL INDUSTRY
Engineering Services

SEGMENT
Large Business

COUNTRY/REGION
North America

SOFTWARE AND SERVICES
Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003 and 2007
Microsoft Exchange Server 2003 & 2007
Microsoft SQL Server 2005
Windows XP and Windows Vista

MICROSOFT PARTNER
Avanade, Inc.
www.avanade.com





The Norris Group Lands Microsoft Dynamics CRM Live to Efficiently Develop Up-Sell Opportunities

Ten years of customer history and order data were “held hostage” by an online e-mail marketing vendor. New anti-spamming restrictions plus an unstable platform riddled with bugs introduced costly errors and lacked vital features The Norris Group needed. The database progressively degraded after the real estate company’s managers brought the data in house. When it crashed, chunks of data the company painstakingly collected over 10 years were lost. That spurred a comprehensive search that identified two CRM solution alternatives. The ease of use and hosted option tilted the decision in favor of Microsoft Dynamics CRM Live. Since migrating to the new solution, marketers eliminated direct mail to 75 percent of the company’s least profitable contacts.

BUSINESS NEEDS

The Norris Group managers felt “locked in” with an online marketing vendor. They relied upon them heavily to capture, maintain and use both customer history and order data in their marketing campaigns. The vendor eliminated critical features, leaving The Norris Group in a bind. When the vendor’s platform produced an increasing numbers of bugs, Norris Group managers decided to act. “The e-mail vendor eliminated the very features we needed to effectively market our seminar and loan products,” says Aaron Norris, marketing director for The Norris Group. “That’s when we brought the data in-house and built our own database.”

Things went well at first, but over time their home-grown database began exhibiting errors. These issues eventually culminated in an unrecoverable crash that resulted in customer data loss. That data disaster spurred the Norris Group to find dependable marketing tools within a comprehensive CRM solution.

SOLUTION

Norris began his search for a CRM tool on the Internet. He read many white papers and quickly narrowed the 50 or so CRM systems down to SugarCRM, Salesforce.com, and Microsoft Dynamics CRM. Representatives from the three companies, including Microsoft partner Spinnaker, made their presentations. Norris’ team evaluated them against their two primary requirements of a solution with a low impact on the IT team and easy access for remote users.

“I wanted a hosted solution for two primary reasons,” explains Norris. “I’m basically our IT department so I wanted a solution that would not be a burden on me to implement and maintain. Secondly, I wanted our employees working from home to be able to access and work with CRM data.”

Other requirements included a flexible platform that could easily be configured by non-technical people. The interface also had to be very simple and intuitive to use. “Our customers love our products and services, but we’ve done a poor job in the past of using technologies to capture operational efficiencies,” recalls Norris. “To give you an idea of where we were, we recently implemented e-mail for employees. So we had to set the bar for ease-of-use of a CRM solution very high.”

Based on these criteria, Norris chose Microsoft Dynamics CRM Live. His team makes use of the marketing and sales modules. “I love the interface,” says Norris. “It works very well with Office Outlook and we integrated it to collect data from our Web site.”



Then, as customers interact with the company across different touch points, that activity is tracked and logged. “That helps make Microsoft [Dynamics] CRM [Live] our information hub,” says Norris. “We get a full view of our customers’ activities and preferences, which leads us to creating more sophisticated marketing campaigns.”

The new tool utilizes automated follow-up features to increase visibility and communication between the company’s departments to enhance marketing activities. For example, employees use the marketing module to create targeted marketing lists to advertise an upcoming seminar. Then they craft a campaign that uses direct mail and e-mail channels to contact prospects at appropriate dates before the seminar.

BENEFITS

Microsoft Dynamics CRM Live delivered the reliable platform Norris needed to protect, analyze, and share customer data with employees. His team can now use that data to sell and up-sell his firm’s products and services much more effectively.

- Business intelligence slashes direct mail costs—The company used to send direct mail to 40,000 prospects. Managers used the marketing module to weed out 30,000 low-potential contacts and save the company thousands of dollars in direct mail costs.
- Interdepartmental customer visibility improves up-sell opportunities—Previously, employees in the loan and seminar departments were not aware of customer activity in the other departments.

The new solution allows marketers to scrutinize customer activities, and use that information to optimize cross-sell opportunities. For example, customers who complete training seminars make excellent prospects for the firm’s loan products.

- Automation features significantly boost productivity—The company’s Web site generates 250 new prospects per month. It used to take 62 hours to input that data, but now employees can complete that in seven. After getting prospects into the system, employees used to write individual e-mails to follow up with people using a manual system. To replace that inefficient process, Norris used the solution’s features to create standardized e-mails and letters and automate their distribution at different touch-points in the sales cycle. It used to take many minutes per e-mail versus the seconds it takes now.
- Centralized customer data repository protects corporate assets—Before the CRM solution, when salespeople left the company, they took their client data with them. Microsoft Dynamics CRM Live ensures that hard-won customer data stays with the company and is accessible when employees leave, are on vacation, or are out sick.
- Hosted solution eases administrative burden—By choosing the hosted solution, Microsoft takes on the IT burden of updating and administering the solution. Moreover, the company’s vital customer data is backed up by enterprise-class Microsoft infrastructure and processes.

“Microsoft [Dynamics] CRM [Live] is essential for us to achieve our long-term goal of effective marketing and sales touches with our customers.” Aaron Norris, Marketing Director, The Norris Group

COMPANY

The Norris Group
www.thenorrisgroup.com

VERTICAL INDUSTRY

Real estate

SEGMENT

Small Business

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live
Microsoft Office 2003
Microsoft Exchange Server 2003
Windows XP

MICROSOFT PARTNER

Spinnaker
www.spinnaker.net





High 5 Sportswear, Inc. Wins Big with Microsoft Dynamic CRM Live Lead Management System Deployment and Implementation

COMPANY

High 5 Sportswear, Inc.
www.high5sportswear.com

VERTICAL INDUSTRY

Clothing manufacturing and distribution

SEGMENT

Small Business—120 employees

COUNTRY/REGION

North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live
Windows Server 2003 SP2
Microsoft Office 2003, 2007
Microsoft Exchange Server 2003 SP2
Windows XP

MICROSOFT PARTNER

EMC Global Services
www.emc.com

SITUATION

High 5 Sportswear manufactures and distributes team athletic apparel to more than over 4,000 customers in the United States and Canada. With no formal lead-generation or tracking system in place, salespeople had difficulty capitalizing upon leads from tradeshow and advertising responses. Moreover, lacking a centralized system to manage service issues resulted in time-consuming one-off solutions for every case. The inability to effectively share and manage customer information put a drag on basic business processes such as the quotation of product prices, for instance. As a result, customers quickly found out that if they didn't like a quote from one person, they could call someone else to try and improve upon it. Executives decided to implement a CRM solution to address these challenges. With very limited IT resources and the need to have real-time information available to users, they decided their CRM solution would need to be hosted.

SOLUTION

Managers reviewed and/or tested various CRM alternatives, including ACT! and Salesforce.com. Tom Mercer, vice president of sales and marketing at High 5 Sportswear recalls the criteria that were used to evaluate the options. "The solution had to be easy to use, it had to integrate well with Office Outlook, it had to be scalable, and it had to offer a hosted solution because we frankly didn't have the IT resources to implement and support it on our own." Based on these criteria, Mercer's team selected Microsoft Dynamics CRM Live and planned to implement it to as many as 40 users throughout the company. They utilize the full functionality of the application including marketing, sales and service. The service module was implemented first, giving the company a comprehensive case-management system.

BENEFITS

The company needed only minimal IT resources to implement Microsoft Dynamics CRM Live. "We wouldn't have been able to do it ourselves, or it would have taken 18 months or more," explains Mercer. Microsoft maintains the application, ensuring that it is available and that data is backed up. High 5 Sportswear's marketers will use the marketing module to increase hot leads by creating targeted lists and customized campaigns. The sales module provides an organized system for salespeople to consistently manage leads from beginning to end. "Being able to automate the creation of customer communications and follow-up tasks makes us more relevant to our customers," explains Mercer. As for the service module: "We now have a system to track interactions with customers and work issues to an effective and efficient resolution," says Mercer.

"What Microsoft [Dynamics] CRM [Live] does for us is make us much more effective and efficient in managing customer issues and capitalizing on opportunities."

Tom Mercer, VP of Sales and Marketing, High 5 Sportswear





High-End Real Estate Company **JBMRA** Puts Mobile Brokers in Prime Position to Increase Sales—with Microsoft Dynamics CRM Live

SITUATION

JBMRA—Sperry Van Ness Institutional (JBMRA) specializes in the marketing of high-end real estate properties in the United States. Sales depend upon the ability of brokers and agents to promote these properties and work knowledgeably with prospective buyers. As properties become available, agents and brokers accessed the firm's Office Outlook public folders and records kept in Office Excel spreadsheets. "Our legacy systems had a ridiculous amount of contacts and data," says Derrick Dike, director of information technology services at JBMRA. "Our data was a corruption waiting to happen, and I knew we needed to migrate to an effective long-term CRM solution."

SOLUTION

Dike's past experience and research led him to do trials with Basecamp, Salesforce.com, and Microsoft Dynamics CRM Live. He chose the Microsoft solution because it best met his criteria. "Microsoft [Dynamics] CRM [Live] integrates with our Web site to capture visitor data and allow us to follow up with them," explains Dike. "We also like that it's highly configurable and allows us to tailor our contact and account fields to suit our specific data needs. The application's support for our highly mobile brokers was another big plus."

BENEFITS

Microsoft Dynamics CRM Live eliminated the risk of losing decentralized customer data. The firm's information is protected on Microsoft-hosted servers that utilize reliable data backup processes and technologies. The application allows mobile users to access and input data on the move, something that brokers could not do previously. They can do offline background synchronization with Office Outlook. Moreover, brokers can immediately log notes about a client walkthrough, which another broker can later access to tailor the presentation of a property to their prospect. From an IT perspective, Dike likes the hosted solution. "Microsoft [Dynamics] CRM [Live] is not a burden on our limited IT resources. It also synchronizes data well among offices. That's something I had problems with using other applications."

"Microsoft [Dynamics] CRM Live allows our mobile brokers to access and use customer data offline and to collaborate with each other to close sales."

Derrick Dike, Director of Information Technology Services, JBMRA – Sperry Van Ness Institutional

COMPANY

JBMRA – Sperry Van Ness Institutional
www.jbmra.com

VERTICAL INDUSTRY

Real Estate

SEGMENT

Small Business—20 employees at JBMRA

COUNTRY/REGION

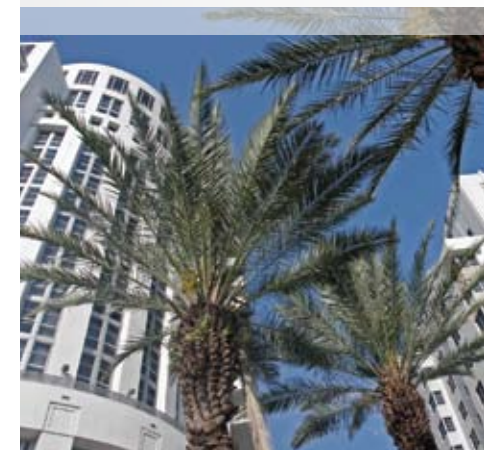
North America

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live (Microsoft-hosted deployment)
Windows Server 2003
Microsoft Office 2003 and 2007
Microsoft Exchange Server 2003
Windows XP and Windows Vista

MICROSOFT PARTNER

Workopia, Inc.
www.workopia.com





South African Tourism Agency Chooses Microsoft Dynamics CRM to Attract Visitors and Strengthen Relations with Distinct Customer Groups

The goal of South African Tourism's global employees is to increase tourism to the nation to help enhance the nation's economy. This global presence created a unique challenge: collaboration between offices across time zones. Managers had little visibility into what employees were doing. Lacking this basic knowledge, decision makers had difficulty tying activities to results and the achievement of their strategic initiatives. To address this issue and more, they leveraged the research of a tier-one customer relationship management consultancy and selected Microsoft Dynamics CRM. Managers favor the application's multi-tenancy feature to tailor data to suit the agency's three main user groups.

BUSINESS NEEDS

South African Tourism (SAT) was organized to drive tourism to create both jobs and trade to benefit the South African economy. Seventy of the agency's 150 employees work in other countries, making it difficult for managers to track their promotional activities and fully leverage collaborative efforts. Marketing strategists had difficulty in measuring whether their programs and initiatives were effective, and if so, what specifically was accounting for the success. Adding to the collaboration obstacles was the fact that global employees speak different languages, work in different time zones, and use different currencies.

SAT's legacy technologies compounded the problem. "Databases" consisted of spreadsheets and standalone applications that lacked the interface to effectively manage and mine data. "We would get reports, but they weren't detailed enough to act confidently upon," explains Fiona Buchner, manager of e-business for SAT.

On the service side of the house, the agency's proprietary call-center agent database performed poorly and lacked the flexibility to enable effective customer service.

"Overall, our biggest burning desire was to capture and store customer contact data so that it becomes institutional knowledge that is not lost or unavailable when someone leaves us or goes on vacation," recalls Buchner.

SOLUTION

Eager to improve the capture, use, sharing, and financial potential of relationship data, Buckner started the very intensive government procurement process. "We completed extensive due diligence comparing the Oracle CRM application to Microsoft Dynamics CRM," recalls Buchner. "Our analysts felt that from a Microsoft environment integration and cost perspective, Microsoft CRM better suited our needs."

SAT chose the on-premise deployment of Microsoft Dynamics CRM, using all three of its modules: marketing, sales, and service. Several application features stood out as being particularly valuable for SAT's environment. "We needed the multi-tenancy feature because we have three different user groups that capture and use different data," says Buchner. "This solution lets us customize their user experience at minimal cost and ongoing maintenance."



The three user groups consist of trade relations managers, who collect and use data relating to international travel contacts like tour operators and travel agents; marketing and communications managers, who establish and cultivate long-term relations with global media contacts like editors and journalists; and business tourism managers, who solicit global business attendees to large-scale conferences and exhibitions held in South Africa.

SAT's call center responds to callers from all over the world 24/7. To upgrade SAT's call center responsiveness, call agents will use the Microsoft Dynamics CRM service module. "Our agents serve a number of international trades, businesses, and individuals," explains Buchner. "They collect that customer information, send brochures and answer questions they may have. It's a critical application for our 20 agents."

SAT managers plan to organize standard procedures for marketing and communications campaigns and use the Microsoft Dynamics CRM workflows feature to establish controls that ensure consistency across deliverables. They will also use the workflows to make sure that customer-facing communications are reviewed to meet corporate standards. Beyond that, employees will use the marketing module to create marketing lists for campaigns specific to each of the three discrete user groups at SAT.

BENEFITS

The Microsoft Dynamics CRM implementation replaces inefficient legacy systems with a centralized data repository to provide a 360-degree view of customers.

- Enables proactive decision making—By implementing multi-language, multi-currency capabilities, global employee activity and notes are searchable and reportable to substantially improve the actionable knowledge available to marketing strategists.
- Facilitates customization and is user centric—The Microsoft Dynamics CRM multi-tenancy feature allows SAT to tailor data for use by its three distinct user groups. Only data relevant to each user is presented on their tab.
- Delivers enhanced productivity—By collecting and storing data about customers and linking the results of marketing initiatives to them, managers can aggregate data to start establishing benchmarks. As a result, they can start measuring performance and taking actions to improve upon those results.
- The process-centric call center can make use of productivity-enhancing workflow capabilities to ensure consistency in customer interactions and ultimately reduce the average number of minutes to resolve an issue or serve a customer request.

"Microsoft CRM met the biggest burning desire for our organization. The need to organize, store and access customer data so that it becomes an institutional asset that we don't lose when someone gets a job elsewhere." Fiona Buchner, Manager of E-Business, South African Tourism

COMPANY

South African Tourism
www.southafrica.net

VERTICAL INDUSTRY

Tourism

SEGMENT

Medium Business—150 employees

COUNTRY/REGION

Africa

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office 2003
Microsoft Exchange Server 2003
Microsoft SQL Server 2005
Windows XP

MICROSOFT PARTNER

IS Partners
www.ispartners.co.za





VOLT®

Volt Information Sciences Employs Microsoft Dynamics CRM to Coordinate Sales Activities and Utilize Business Intelligence

Volt Information Sciences, Inc. provides staffing services, telecommunications, and information solutions to Fortune 100 customers. The global operator's 5,000 employees worked in an environment where customer data was kept in a wide array of databases using tools as diverse as Office Outlook, ACT!, and even Rolodexes. These solutions created silos of customer information, limited visibility into sales and marketing data, and hampered employees from effectively collaborating on major accounts. To address these challenges, executives implemented Microsoft Dynamics CRM because it best met the firm's usability, user acceptance, and system integration criteria.

BUSINESS NEEDS

Volt Information Sciences, Inc. (NYSE: VOL) provides staffing, telecommunications, and information solutions to Fortune 100 companies through four business segments. The firm's 5,000 employees represent a global workforce, operating out of the United States, Canada, Europe, Asia, and South America. When it came to marketing and sales operations, the \$2.3 billion-a-year company faced a number of challenges.

Employees had adopted a heterogeneous mix of contact management solutions, relying upon Office Outlook, ACT!, their Rolodexes, and spreadsheets to keep track of customer data. This led to the proliferation of customer data silos. With visibility into sales limited to the local office level, business units could not coordinate their efforts. For example, business units focused on placing engineering or accounting personnel respectively could not always leverage the success of each other to penetrate the same account.

Moreover, managers could not effectively collect and report their customer-related data beyond their own office, nor were they using consistent terminology across offices.

SOLUTION

"We applied a rigorous process to find a CRM solution," says Steve Acterman, director of corporate IT at Volt. "We did extensive research beginning with the tools our employees were already using, then expanding the search to focus on scalable enterprise solutions." Additional criteria included the ability to seamlessly operate with Office Outlook as the firm's employees rely upon it heavily throughout their day. Additionally, IT staffers needed a solution that could tightly integrate with the company's SQL Server and Microsoft Exchange platforms. And finally, they needed a CRM solution that would effectively support both online and offline work.

Decision makers narrowed the field to Siebel CRM, Onyx CRM, SugarCRM, and Microsoft Dynamics CRM—and selected Microsoft because its solution best met their requirements. They implemented Microsoft Dynamics CRM 3.0 on a wide scale and have since upgraded to Microsoft Dynamics CRM.

Initially, the Staffing Services Group will be issued more than 450 licenses for the new version with other operating segments joining the new platform as the solution is phased in.

Employees will use the sales module to support sales force automation objectives. "The activities of our salespeople will be seamlessly integrated into the familiar Office Outlook interface," explains Acterman. "Their phone call to-do list will be provided to them and where they make contact, the results will be logged into Microsoft [Dynamics] CRM so that coworkers in their office and other business units can use that data," added Robin Kibota, Volt's CRM project manager.



Another enhanced feature in Microsoft Dynamics CRM is the ability to support many-to-many relationships. Volt managers will make use of it to facilitate up-sell and cross-sell opportunities across business units.

The sales module implementation will eventually encompass international offices, taking advantage of multi-tenancy, multi-language, and multi-currency features now available in the new version. Later phases will introduce the application's marketing module for general use throughout the company.

BENEFITS

Microsoft Dynamics CRM is designed to meet the needs of a multinational company like Volt. It can support the firm's diverse business units, allowing them to collaborate on Fortune 100 accounts and ensure executives have the global data they need to create reports that capture sales intelligence and lead to sound decisions.

- Multi-tenancy, multi-language, and multi-currency features position the company for global expansion and enhanced competitiveness—The application's multi-tenancy feature ensures that Volt can implement its CRM solution enterprise-wide to envelope all its international locations. Moreover, by phasing in its international offices, salespeople there can be as effective as their North American counterparts, and be more competitive in winning additional business from international Fortune 100 accounts.
- Sales force automation increases employees' performance—Using the new solution, salespeople will more effectively manage their pipeline to increase their win rates and shorten the sales cycle.

- Highly configurable and flexible platform speeds time to use—Because Microsoft Dynamics CRM can be configured so easily and quickly, Volt managers can bring other departments and customer-facing platforms on board very rapidly.
- Reports based on comprehensive customer data creates actionable intelligence:
 - > The new solution puts Volt employees on a standard CRM platform utilizing the same sets of reports based on common data fields and terminology. Hence managers can create reliable reports to identify trends and measure sales activity.
 - > In Microsoft Dynamics CRM, users may generate custom queries/views and save them to a pick list without the aid of a programmer.
- Centralized solution eliminates customer data silos to increase cross-sell opportunities:
 - > The many-to-many relationship feature, which provides the ability to tie many accounts to multiple opportunities with multiple roles, gives employees the ability to more effectively coordinate their sales efforts. So rather than approaching the same company as three different divisions unaware of the experience of the others, salespeople can touch them as a single company.
 - > Additionally, sales people can research Microsoft Dynamics CRM to get up to speed on how others have penetrated accounts before they even pick up the phone to make the first call.

“The many-to-many relationship feature available in Microsoft Dynamics CRM gives our employees the ability to effectively coordinate across numerous accounts with multiple sales opportunities. Steve Acterman, Director of Corporate IT, Volt Information Sciences, Inc.

COMPANY

Volt Information Sciences, Inc.
www.volt.com

VERTICAL INDUSTRY

Staffing and IT services

SEGMENT

Large Business

COUNTRY/REGION

North America

EMEA

LATAM

SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0
Windows Server 2003
Microsoft Office Professional 2003;
transitioning to 2007 for Microsoft
Dynamics CRM 4.0 rollout
Microsoft Exchange Server 2003
Microsoft BizTalk Server 2006
Microsoft SQL Server 2000;
transitioning to 2005 for Microsoft
Dynamics CRM 4.0 rollout
Windows XP Professional

MICROSOFT PARTNER

ePartners Incorporated
www.epartnersolutions.com





COMPANY

Accium BioSciences
www.acciumbio.com

VERTICAL INDUSTRY

Contract Research Services for the
Pharmaceutical, Biotech and Medical
Devices Industry

SEGMENT

Small Business

COUNTRY/REGION

United States

SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live
Microsoft Office 2003
Microsoft Exchange Server 2003 (Hosted)
Windows XP and Windows Vista

MICROSOFT PARTNER

Workopia, Inc.
www.workopia.com

Accium BioSciences Finds Perfect Formula to Increase Customer Satisfaction and Reduce Time to Market with Microsoft Dynamics CRM Live

SITUATION

It takes about 12 years and \$1 billion to develop, test, and bring a new drug to market. Reducing that time means saving millions for Accium BioSciences' pharmaceutical customers. The company uses its expertise to speed the clinical trials process. But manual processes, such as keeping track of information in spreadsheets and on notes, made reaching prospects and managing a pipeline difficult. "In order for us to be successful in our sales, marketing, and service efforts, we had to go to an integrated system," says Michael Chansler, vice president of business development. "One that would provide a central repository of information on our clients and their projects as well as provide workflows to automate and codify our processes."

SOLUTION

Chansler had used Salesforce.com but considered it hard to integrate into the office's Microsoft platform. "We ended up choosing Microsoft [Dynamics] CRM [Live] because it replaces manual systems with a way to track and manage prospects," explains Chansler. "So that we not only pursue more profitable opportunities, but close more of them." Initially, the company is using the marketing and sales modules. In Phase I, the sales module has been configured with custom data fields and the ability to track discrete projects for the same customer. In Phase II of the deployment, executives will be able to create reports and service personnel can manage clinical protocol projects with the service module.

BENEFITS

The process to complete testing of tissue/fluid samples for clinical trials is complex and requires intricate interdepartmental communication. "Previously, we spent a lot of time handing off a project from one department to another," says Chansler. "That was frustrating to our clients who had to explain the situation again, and unnecessarily extended the process. Now, with Microsoft [Dynamics] CRM [Live], the new department can read the project notes for that customer and quickly pick up the ball. That translates into higher customer satisfaction, which in turn boosts our retention rate. It's always easier to keep a customer than it is to acquire a new one."

"Given the complexity and detail of our business, it would not be possible to meet our growth objectives without a tool like Microsoft Dynamics CRM [Live]."

Michael Chansler, Vice President of Business Development, Accium BioSciences



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