



SUCCESS

*Showcasing Business Success:
Microsoft Dynamics™ CRM 3.0
Customer Stories*



Microsoft Dynamics CRM

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The Real Thing: Customer Success Stories

Competitive advantage is harder to achieve—and even more difficult to maintain—than ever before. Your business success depends on whether your employees can respond with speed, knowledge, and confidence to the ever-shifting needs of your customers and the ever-changing strategies of your competitors.

Microsoft Dynamics™ CRM 3.0 gives you the power you need to achieve that competitive edge. Businesses of all sizes, reaching across a wide range of industries, can gain a deeper understanding of customers and markets and then pursue the opportunities that emerge at every stage of the customer life cycle. Fast, flexible, and affordable, Microsoft CRM can drive improvements for every business process that touches your customers.

Along with a complete suite of powerful marketing, sales, and service capabilities, Microsoft CRM offers a familiar, easy-to-use interface based on the Microsoft® Office and Microsoft Office Outlook®. Extensive new configuration, customization, and integration capabilities make it easy for customers and partners to deploy highly tailored solutions that drive measurable business results and offer a low total cost of ownership.

Read on, and see how Microsoft Dynamics CRM 3.0 has helped businesses across the world build profitable customer relationships.





"Microsoft CRM 3.0 is leaps ahead of the competition."

CommtechWireless

centralizes data, speeds tracking of customers and leads with Microsoft Dynamics CRM 3.0

COMPANY:

CommtechWireless
www.commtechwireless.com

VERTICAL INDUSTRY:

High Technology and Electronics

SEGMENT:

Small Business

COUNTRY/REGION:

Australia

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP

MICROSOFT PARTNER:

Power Business Systems Group Pty Ltd
www.power.net.au

SITUATION

CommtechWireless faced a problem increasingly common to many companies: Too much customer information in too many places across the organization. Deployed at 4,500 sites across 53 countries, CommtechWireless' products include pagers and beepers used by restaurants and health care facilities, as well as PC-based and telephone paging applications. However, with customer information scattered across multiple databases, the company's process for tracking customers was inefficient and error-prone. Plus the company had difficulty monitoring and ensuring quick follow-up on sales leads. "With our extensive databases, keeping track of the follow up to new enquiries was just too hard before CRM," says Derek Hughes, Marketing Information Analyst.

SOLUTION

After evaluating several CRM solutions, CommtechWireless chose Microsoft CRM and quickly deployed the solution at its headquarters in Perth, Australia, and its U.S. subsidiary in Jacksonville, Florida. "Microsoft CRM 3.0 is leaps ahead of the competition," Hughes says. Describing their recent migration from Microsoft CRM 1.2 to 3.0, CEO Nathan Buzza says, "In the space of just one day we swapped out 1.2, installed 3.0, and everyone was up and going the following day."

BENEFITS

With Microsoft CRM, CommtechWireless has a central repository for client data, which allows its employees to easily access, retrieve, and share customer information. In addition, because sales leads are now entered directly into Microsoft CRM, the company's marketing department can track their status and follow up quickly. Buzza states, "As the CEO of a global company, Microsoft CRM allows me to log in to all of our remote sites to get a snapshot of what's going on. We've set up the roles-based security so that I can VPN directly to a remote location and get a snapshot of what any of my business units are doing, real time, any day of the week."



"Microsoft CRM works the way technology should."

Absolute Software

finds better performance, happier sales reps with Microsoft Dynamics CRM 3.0

COMPANY:

Absolute Software
www.absolute.com

VERTICAL INDUSTRY:

High Technology and Electronics

SEGMENT:

Midmarket

COUNTRY/REGION:

Canada

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

iFusion Solutions Inc.
www.ifusioncrm.com

SITUATION

Even the best software is of little value if it isn't being used. And the sales representatives at Vancouver, British Columbia-based Absolute Software were barely using the company's previous CRM system. They complained that it was balky and slow and didn't integrate well with the Microsoft Office System, according to Risa Zaleski, the company's Director of Operations. Having an inefficient CRM system created significant challenges for this company, whose global software offerings include ComputraceComplete, a computer and security tracking software that enables companies to protect data on computers, deter theft, delete data on stolen laptops, and recover stolen computers. Absolute's business model heavily revolves around superior, efficient customer relations—particularly at times when their customer might be experiencing the stress of trying to locate stolen computer equipment!

SOLUTION

Absolute deployed Microsoft CRM—a change that has heartened the company's sales representatives and employees. "People are very, very happy with Microsoft CRM, and the sales group has quickly adopted it," Zaleski says. Equally important: "The performance is great. We have probably 50,000 account records and 80,000 contact records in our database, and the performance is snappy—much better than what we were using before."

BENEFITS

Risa Zaleski states, "Microsoft CRM works the way technology should. Through utilization of Microsoft CRM, our Sales and Technical Support departments now share critical information and have forged a closer, more efficient relationship." For instance, by integrating information from Microsoft CRM into the company's internal defect-tracking system, Absolute's Technical Support and Sales professionals can see precisely where in development a certain defect is. And with the arrival of Microsoft CRM 3.0, Absolute's marketing staff is preparing to track sales leads and the ROI associated with the company's marketing campaigns and trade shows.

AbsoluteSoftware

"The number one reason we chose Microsoft CRM is because it is easy to use."

Microsoft Dynamics CRM 3.0 helps **Greater Twin Cities United Way** save time & increase efficiency

COMPANY:

Greater Twin Cities United Way
www.unitedwaytwincities.org

VERTICAL INDUSTRY:

Not for Profit

SEGMENT:

Midmarket

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Office 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Great Plains® 8.0

MICROSOFT PARTNERS:

[Inetium Inc.](http://www.inetium.com)
www.inetium.com

[ScribeSoft](http://www.scribesoft.com)
www.scribesoft.com

SITUATION

If you've ever received multiple solicitations from the same charitable organization at the same time, you understand why Greater Twin Cities United Way—which serves a population of 2.75 million across nine counties in the Minneapolis/St. Paul, Minnesota area—was eager to implement a more effective CRM system. The organization's legacy CRM system struggled to track pledges from its 190,000 donors. In fact, "the reality was that 90 percent of the information about what was going on with donors and donor companies was just being stored in people's heads," says Sandy Clifford, Director of Market Technology and IT.

SOLUTION

"The number one reason we chose Microsoft CRM was because it is easy to use," Clifford says. "We have a large number of temporary staff and people who are loaned to us from companies just for the campaign season. So you can see that we don't have much time to bring people up to speed on how to work with a piece of software." Commenting on the organization's recent upgrade from Microsoft CRM 1.2 to 3.0 Clifford observes, "The upgrade was a very seamless process. It took us less than three hours."


BENEFITS

"One really big benefit of Microsoft CRM," explains Clifford, "is illustrated by the fact that last year, instead of making phone calls to ask the representatives of companies how their campaigns were doing, we used Microsoft's bulk e-mail system to accomplish this project. Talk about saving time and money!" Clifford continues, "Greater Twin Cities United Way has been making dramatic improvements over the last three years, and Microsoft CRM has been an integral part of those changes."

"We all win with Microsoft CRM!" says Clifford.







"I'm not an IT guy, but with Microsoft CRM I can just go in there and do most of the customizations myself."

Microsoft Dynamics CRM 3.0: A key ingredient in **Roman Meal's** marketing success

COMPANY:

Roman Meal Company
www.romanmeal.com

VERTICAL INDUSTRY:

Distribution/Food Services

SEGMENT:

Midmarket

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows® Small Business Server 2003
Microsoft Office 2003
Microsoft Windows XP Professional

MICROSOFT PARTNER:

TriVenture
www.triventure.com

SITUATION

For Roman Meal Company, a leading producer of quality bread, English muffins, and cereal, the need was simple: A software solution that could help it do business more efficiently. The Tacoma, Washington-based company wanted to share additional information with its franchisee bakers, put together new marketing programs, and respond more quickly to the needs of its customers. "We were looking for a way to use technology to leverage our brand even more and to keep the Roman Meal name in front of bakers, consumers, and our business partners," says Mike Berger, the company's Business Resource Manager.

SOLUTION

Roman Meal evaluated virtually every CRM solution on the market before selecting Microsoft CRM. "What I saw with Microsoft CRM was more flexibility than the other CRM solutions and an ability to fit our business model," Berger says. "The other applications couldn't handle the different types of sales data we need to track." In addition, Berger explains, Roman Meal wanted to house their CRM infrastructure externally but wasn't interested in a standard hosted model. "We wanted to own the software," Berger says. "So what it came down to is that Microsoft CRM really fit our business model." Roman Meal purchased Microsoft CRM and contracted with their Microsoft partner, TriVenture, to host Microsoft CRM off site.

BENEFITS

Roman Meal implemented Microsoft CRM 1.2 last year and recently upgraded to Microsoft CRM 3.0. With it, the company is carrying out e-mail campaigns that touch its customers and reach deep into the ranks of its franchisees. "Microsoft CRM keeps the Roman Meal brand in front of everyone, instead of just a few key people," Berger says. And it's been remarkably easy to use—even for nontechnical types. "We wanted a CRM system that was easy to use, so we didn't always have to bug the IT guys," Berger explains. "I'm not an IT guy, but with Microsoft CRM I can just go in there and do most of the customizations myself."



"We are improving our competitiveness and customer service, and saving costs due to higher efficiency."

Volvo Baumaschinen builds better customer service, improves marketing efforts using Microsoft Dynamics CRM 3.0

COMPANY:

Volvo Baumaschinen Österreich GmbH
www.volvoce.at

VERTICAL INDUSTRY:

Automotive and Industrial/Distribution

SEGMENT:

Enterprise

COUNTRY/REGION:

Austria, Czech Republic, Hungary,
Slovakia, Croatia

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Unidienst GmbH
www.unidienst.de

SITUATION

Companies that operate in highly competitive fields face a unique challenge: keeping costs competitive while ensuring high-quality customer service. That was the case for Volvo Baumaschinen Österreich GmbH, an Austria-based distributor of Volvo-branded construction equipment. The company faced difficulties finding and sharing customer information across the organization, which often led to customer-service issues. The company's need for a CRM solution was readily apparent. "We needed a system that supported the sales process and customer relations in a flexible and efficient way," says Klaus Längauer, the company's Sales and Marketing Manager.

SOLUTION

Volvo discontinued using its homegrown CRM system and deployed Microsoft CRM. The results were readily apparent. "With an improved knowledge about the customer and a better and more efficient information flow from our sales force to the back office functions, we are improving our competitiveness and customer service, and saving costs due to higher efficiency," Längauer says.

Managing Director, Dr. Thomas Schmitz adds, "We operate in seven countries and for cultural reasons there are slightly different business approaches in each country. This is why it's essential to have a flexible tool like Microsoft CRM to unify our database and maintain core process workflows."

BENEFITS

With its recent upgrade to Microsoft CRM 3.0, Volvo Baumaschinen benefits from enhanced marketing functionality. "We have set up a new team to develop business in special market areas, and these people are looking forward to having a tool for their letter, postcard, and e-mail campaigns," says Peter Glück, the company's IT Manager. "We think the campaign management in Microsoft CRM 3.0 fits perfectly. We already did some campaigns in Version 1.2, which worked well, but when it comes to having a clear and detailed history, the new functionality in 3.0 is very helpful."

VOLVO

"Microsoft CRM 3.0 enables us to provide the right person with the right medical expertise for the right case."

Essex Medical

schedules success using Microsoft Dynamics CRM 3.0

COMPANY:

Essex Medical & Forensic Services Ltd.
www.emfs-ltd.co.uk

VERTICAL INDUSTRY:

Healthcare

SEGMENT:

Small Business

COUNTRY/REGION:

United Kingdom

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows® Small Business Server 2003

MICROSOFT PARTNER:

[Aspective](http://www.aspective.com)
www.aspective.com

SITUATION

Founded in May 2004, Essex Medical & Forensic Services, Ltd., (EMFS) dispatches doctors, nurses, and paramedics to treat detainees who require medical treatment while in police custody. The company first began providing this service in Bedfordshire, United Kingdom, in January 2005, and then rapidly expanded into Essex and Suffolk. With the expectation that their network of 150 medical professionals would soon expand, Essex recognized that in addition to being powerful and able to easily integrate with their Avaya Contact Centre solution, the CRM system they chose would need to be affordable and scalable.

SOLUTION

Essex Medical purchased Microsoft Dynamics CRM and elected to deploy this solution on Microsoft Windows Small Business Server 2003. "Implementing Microsoft CRM on Small Business Server was definitely the right thing to do for our business," states Steve Roberts, Business Director. "Deploying Microsoft CRM on the Small Business Server gives me a very powerful CRM platform at the right price." And when EMFS had the opportunity to upgrade from Microsoft CRM 1.2 to 3.0, they were able to do so in less than 24 hours.

BENEFITS

Tightly integrated with EMFS's Avaya solution, "Microsoft CRM 3.0 enables us to provide the right person with the right medical expertise for the right case," Roberts says. "It enables us to respond to police calls and dispatch medical services quickly so that the police can focus on the process of justice." Particularly appreciative of their new CRM solution's speed, Roberts explains, "Microsoft CRM is incredibly fast. And to just put into perspective why that's important to us—every minute saved is giving the police more time to spend on the judicial process."







"Microsoft CRM helps us manage our customer relationships profitably."

Microsoft Dynamics CRM 3.0 helps **CSR Roofing** improve and better quantify marketing efforts

COMPANY:

CSR Limited
www.csr.com.au

VERTICAL INDUSTRY:

Architecture, Engineering, and Construction/
Durable Consumer Goods

SEGMENT:

Enterprise

COUNTRY/REGION:

Australia

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft Office 2003
Microsoft Windows® XP Professional

SITUATION

Stephen Powell was tired of not being able to quantify the effectiveness of his marketing campaigns. "I get all this advertising together, create a campaign, and send it out—and never seem to get the feedback to justify what we've been doing," says Powell, the National Architectural Segment Manager at Sydney, Australia-based CSR Roofing, a division of CSR Limited. So when Powell learned that his organization was implementing Microsoft CRM 3.0, he was thrilled at the prospect of having a solution that could make his job easier. After all, Powell's job is to persuade between 3,500 and 4,000 architects to specify his roofing products in their designs.

SOLUTION

In addition to being able to quantify marketing effectiveness, Microsoft CRM is replacing the company's antiquated database and paper-based processes, helping it quickly qualify and track large volumes of leads, and empowering Powell to more effectively share information with his superiors.

"The workflow in Microsoft CRM enables us to define and implement consistent business processes."

BENEFITS

With Microsoft CRM, CSR is increasing its marketing activities and taking control of its lead and reporting processes. Powell has been impressed with the company's new Microsoft CRM 3.0 solution. "The new version fits what we do exactly," Powell says. "It allows you to manage each campaign and track the results from it. So if we advertise in a particular magazine, we can easily monitor leads we receive, measure how much it costs to advertise there, and understand the results we got from the ad. We couldn't do that before... Microsoft CRM helps us manage our customer relationships profitably."



"Our service people love Microsoft CRM because they are finally able to share vital information, which is critical to the success of our business."

Travel Global Systems improves customer service, information sharing with Microsoft Dynamics CRM 3.0

COMPANY:

Travel Global Systems
www.travelholdings.com/brands-TravelGlobalSystems.html

VERTICAL INDUSTRY:

IT Services

SEGMENT:

Midmarket

COUNTRY/REGION:

Israel

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Effect, Ltd.
www.effectcrm.co.il/he/index.html

SITUATION

Getting Sales and Technical Support to collaborate is rarely easy or natural. But it's even more difficult when they're located on two different continents. That was the dilemma faced by Travel Global Systems (TGS), a fast-growing company that provides business-to-business and business-to-consumer software solutions for the travel industry. TGS' sales arm is located in the United States, while its development and technical support areas are located in Tel Aviv, Israel. "We are really one company located in two places," says Roy Eldar, IT manager at TGS. "The differences in time and location made it difficult to share information." In addition, the company's previous manual processes for tracking service requests and e-mail trails were slow and error-prone, often resulting in a poor customer experience.

SOLUTION

"I used to manage all my clients through e-mail by creating rules," says Technology Director Roy Eldar. "But then I ran out of rules! I needed a more powerful system to manage my customers—that's when we purchased Microsoft CRM." Web-based Microsoft CRM enables TGS in both continents to have all of their customer information stored in one place. When the customer calls for support, in a few keystrokes TGS can access the history of this customer: what happened before, what happened last month, what happened since they joined, what kind of support they get, and what kind of service they're eligible to receive.

BENEFITS

TGS service representatives no longer need to manually search for information or send one-off e-mail requests to colleagues. "Our service people love Microsoft CRM because they are finally able to share vital information, which is critical to the success of our business," Eldar says. "For us, having a web-based CRM solution was imperative. Microsoft CRM makes it possible for us to work more cohesively as a global corporation."



“We have now real-time data reporting, and this was not possible before... that saves us time because we don’t have to search for the data from all over.”

Microsoft Dynamics CRM 3.0 helps **Mall** centralize data, increase customer satisfaction

COMPANY:

Mall GmbH
www.mall.info

VERTICAL INDUSTRY:

Architecture, Engineering, and Construction

SEGMENT:

Midmarket

COUNTRY/REGION:

Germany

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2000
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® 2000 Professional
Microsoft Windows XP Professional

MICROSOFT PARTNER:

ITVT
www.itvt.de

SITUATION

As a recognized leader in the field of precasted construction, Mall's products are used primarily in sewage treatment plants and for rainwater management. However, because important customer information was scattered across the company's 20 sales offices across Germany, the company's 400 employees had difficulties accessing and acting upon it, which occasionally led to customer service issues. "For our business actions we need transparency, agility, and efficiency," says Markus Boell, the company's Sales and Marketing Manager.

SOLUTION

Along with seeking a centralized solution from which to share information, Mall also wanted an IT solution that would integrate with the company's ERP system. In addition, the solution had to be easy to use. "I think new technology must be reliable, easy to maintain, and easy to operate. That is what Microsoft® CRM does and why we went with it," Boell says.

BENEFITS

Mall has been pleased with Microsoft CRM's familiar Microsoft Office Outlook® user interface because it significantly increases user adoption, thereby increasing the benefits to their company. By deploying Microsoft CRM 1.2 and recently upgrading to Microsoft CRM 3.0, Mall has instant access to both customer and ERP information. "With Microsoft CRM, we have centralized data and better customer satisfaction," Boell says. "We have now real-time data reporting, and this was not possible before," Boell says. "That saves us time because we don't have to search for the data from all over."







"Microsoft CRM 3.0 has everything on my wish list."

The Sounds of Success: **Euphonix** turns to Microsoft Dynamics CRM 3.0 for easier information sharing and lead tracking

COMPANY:

Euphonix, Inc.
www.euphonix.com

VERTICAL INDUSTRY:

High Technology and Electronics

SEGMENT:

Midmarket

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Workopia, Inc.
www.workopia.com

SITUATION

"Very primitive." That's how Russell Waite, Executive Vice President of Worldwide Sales at Euphonix, Inc., describes the company's previous FileMaker contact management system. The system didn't provide easy access to customer data, which resulted in difficulty tracking and following up on sales leads and limited the company's marketing efforts. That wasn't good news for the Palo Alto, California-based manufacturer of digital audio mixing consoles for live broadcast, TV, and film audio post-production and music production applications. Because its sales cycle often takes 12 to 18 months, Euphonix sought a CRM solution that could help the company track the activities and opportunities inherent in long sales cycles. The solution also had to integrate closely with the company's existing desktop, particularly Microsoft Office Outlook®.

SOLUTION

"After extensive research, we determined that Microsoft CRM was best suited for our needs," says Waite. Familiar with the dreaded complexity of CRM software deployments, Andy Izsak, the company's Director of Information Technology says, "Out of the six CRM packages Euphonix has installed, Microsoft CRM is the only one that installed essentially flawlessly and integrates completely with all of our systems."

BENEFITS

By deploying Microsoft Dynamics CRM 3.0 to its sales and marketing professionals, Euphonix can easily process, track, and follow up on leads from exhibitions or outside callers. In addition, the company benefits from a centralized location for all its critical data. "With Microsoft CRM, every single one of our employees, whether they are located in Tokyo, Hamburg, or London, has access to information 24 hours a day," says Izsak. The solution has also been heartily adopted by company employees. "Once the staff had seen the power of Microsoft CRM, they were believers," says Jonathan McDonald, the company's Inside Sales Manager. "I know that sounds a bit over the top, but it's quite true."

In summary, "Microsoft CRM 3.0 has everything on my wish list," says Vice President of Worldwide Sales Russell Waite.



“Microsoft CRM melds into Outlook.”

Perot Systems

customizes Microsoft Dynamics CRM 3.0 for increased customer success

COMPANY:

Perot Systems Corp.
www.perotsystems.com

VERTICAL INDUSTRY:

IT Services

SEGMENT:

Enterprise

COUNTRY/REGION:

Global

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft Office 2003

MICROSOFT PARTNER:

Interlink Group, Inc.
www.interlinkgroup.com

SITUATION

If anyone knows delivering global IT services and solutions, Perot Systems Corporation does. From its founding in 1988 with eight associates and just one customer, the Plano, Texas-headquartered company has grown to 18,000 associates serving more than 400 customers worldwide. Because of its significant growth, however, Perot Systems had outgrown its previous sales force automation tool. As a result, it began to experience difficulties capturing, tracking, and sharing client and prospect information at an aggregate level. Perot Systems sought a cost-effective CRM solution that could help it aggregate all that information into a single database and easily handle the massive volume of customer contacts made on a daily basis.

SOLUTION

Perot Systems selected and installed Microsoft Dynamics CRM in under 90 days, integrated the solution with Microsoft Windows® SharePoint™ Services, and customized it to meet the company's unique information needs and business processes. “Microsoft CRM embraces our sales methodology and our sales governance,” states Rick Toma, Director of Global Sales Operations.

“We believe it is important for a global IT services company to retain the customer intimacy heritage established when it was smaller, while also growing its business and delivering new levels of value to its clients,” says CIO Mike McClaskey. “Microsoft CRM is a key enabler of this strategic objective for Perot Systems, as it enables us to cost effectively incorporate our best practices and methodologies, spanning people, processes, and technologies to develop new businesses and solidify our existing customer relationships.”

BENEFITS

“The three greatest benefits that I see our organization getting by choosing Microsoft CRM over the competition are cost effectiveness, flexibility and stability,” observes Toma. “Microsoft CRM melds into Microsoft Outlook®. Now our salespeople don't have to toggle in and out of various programs to work their pipelines.” Regarding the continued projected growth of Perot Systems, Toma says, “It's reassuring to know that we won't have 'growing pains' with Microsoft CRM. As our company grows, Microsoft CRM will grow with us.”

"Microsoft CRM saves our firm a lot of overhead administrative costs."

Pellerano & Herrera

law firm uses Microsoft Dynamics CRM 3.0 to deepen client relationships

COMPANY:

Pellerano & Herrera
www.phlaw.com

VERTICAL INDUSTRY:

Legal Services

SEGMENT:

Midmarket

COUNTRY/REGION:

Dominican Republic

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Rock Solid Technologies

SITUATION

The largest law firm in the Dominican Republic, Pellerano & Herrera serves clients in 110 countries and handles more than 10,000 cases annually. Pellerano & Herrera sought a CRM solution that could help the firm retain, manage, and acquire clients more efficiently by deepening its relationships. "We have a lot of clients and a lot of cases from those clients, but we needed a CRM tool to more effectively leverage these relationships," says Annie Luna, Marketing Director.

SOLUTION

Because Pellerano & Herrera had standardized on a Microsoft technology platform, Microsoft CRM was the obvious choice—and, in the firm's eyes, represents a distinct competitive edge. "Microsoft CRM gives us a huge advantage over our competitors because it enables us to proactively track our clients and market our firm's services," says Luna. "Our law firm has built its success on a proactive approach to client care. Every time laws change and legislation is updated, Microsoft CRM enables us to immediately identify and advise those clients whose businesses are affected. This is how we obtain and maintain the loyalty of our clients."

BENEFITS

"Before we had Microsoft CRM, every e-mail campaign was manual and frequently required hiring additional personnel for coordination," reports Luna. "Today I can quickly initiate and execute an effective targeted marketing campaign single-handedly. Microsoft CRM saves our firm a lot of overhead administrative costs."

In addition, with Microsoft CRM providing a centralized location for all client information, Pellerano & Herrera anticipates marked revenue impact. Luna explains, "Based upon our beta testing and calculations, we believe Microsoft CRM 3.0 will help to significantly increase both our number of clients and the number of cases associated with those clients." Luna continues, "This growth should be reflected in a significant revenue increase the first year—which is much larger than the percentage we normally see."

PELLERANO & HERRERA
ABOGADOS





"Microsoft CRM speaks our language."

Corillian Corporation

banks on Microsoft Dynamics CRM 3.0 for a complete view of business

COMPANY:

Corillian Corporation
www.corillian.com

VERTICAL INDUSTRY:

Banking / High Technology and Electronics

SEGMENT:

Midmarket

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Interlink Group, Inc.
www.interlinkgroup.com

SITUATION

Based in Hillsboro, Oregon, Corillian Corporation is the market-leading provider of scalable and secure Internet banking applications that support more than 25 percent of the online banking users in the United States today. Corillian had outgrown its previous legacy CRM system, which didn't work efficiently for remote employees, was difficult to customize, and required constant and expensive monitoring. "The core application was built several years ago, so it just didn't meet the needs of today," explains Greg Hughes, Director of IT and Security Operations at Corillian.

SOLUTION

"We had a need for a CRM product that would allow us to customize, tweak, add pages, add fields, modify the user interface, do some powerful reporting—and, especially, flex with the needs of the company... Microsoft CRM is a logical, workable approach to customer relationship management," Hughes says. An additional benefit to Corillian is that Microsoft CRM integrates with other systems the company relies upon. "Microsoft CRM speaks our language. Not only does it work the way that we work, but you could say it also speaks the way that we speak."

BENEFITS

Corillian's work force is highly mobile; Hughes appreciates the multi-faceted flexibility of Microsoft CRM. "The great thing about a Web-based CRM experience for me is that if I'm traveling and am down at the coffee shop, in a hotel room, or at the airport I can still access Microsoft CRM through a simple Web browser." An additional clear benefit of Microsoft CRM for Corillian is its familiar interface, which results in eager user adoption. According to Hughes, "The integration and the user interface through Microsoft Outlook® just make Microsoft CRM another part of communicating using Outlook. It almost dissolves into Outlook so that you don't think of it as a separate function or a separate application or a separate set of processes."



"The most important benefit is the integration of Microsoft CRM with the rest of the Microsoft suite."

Grosvenor

uses Microsoft Dynamics CRM 3.0 to foster long-term customer relationships worldwide

COMPANY:

Grosvenor Group
www.grosvenor.com

VERTICAL INDUSTRY:

Real Estate

SEGMENT:

Midmarket

COUNTRY/REGION:

United Kingdom

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Standard Edition
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003 Professional
Microsoft Office SharePoint Portal
Server 2003

MICROSOFT PARTNER:

CIBER UK
www.ciber-uk.com

SITUATION

Formed more than three centuries ago, Grosvenor is an international property development and investment group. It has regional operating companies covering Australia Asia Pacific, Continental Europe, the Americas, Britain, Ireland, and an international fund management business which operates across all these markets. Grosvenor manages a portfolio of £7.7bn.

As part of its migration to a Microsoft® environment, Grosvenor recognised that for CRM to become unified throughout the company, it must be available to all parts of its business worldwide. With regional offices spanning 16 countries, Grosvenor needed a common system.

SOLUTION

Grosvenor chose to standardise on Microsoft technologies and deployed Microsoft CRM to its 550 employees. This platform provided its staff with the ability to think about customer relationships in a different way and to try new processes. Grosvenor's UK Head of IT, Heidi Leroy-Short, says, "Microsoft CRM will become part and parcel of our Microsoft implementation. It will become a natural part of using Microsoft Outlook®".

BENEFITS

Microsoft CRM will help Grosvenor to foster long-term relationships with a wide range of business partners, including building occupiers, attorneys, bankers and investors. "The most important benefit is the integration of Microsoft CRM with the rest of the Microsoft suite", says Systems Director Basil Shall. "It has given us an enormous benefit in that we no longer have to duplicate data across our various systems. In addition, it has allowed us to have a single worldwide view of our customer base."



“When we looked at Microsoft CRM, a whole new world opened up to us.”

Microsoft Dynamics CRM 3.0 helps **InfoMentis** boost marketing, business success

COMPANY:

InfoMentis, Inc.
www.infomentis.com

VERTICAL INDUSTRY:

Professional Consulting Services & Skill
Development/Training

SEGMENT:

Midmarket

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Office 2003
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

I.B.I.S., Inc.
www.ibisinc.com

SITUATION

InfoMentis, a global skills development and consulting firm based in Atlanta, Georgia, is dedicated to helping companies achieve revenue predictability and sustainability by improving their sales, service, support, and marketing effectiveness. The trouble was that InfoMentis' previous system was limiting its own marketing efforts. "It was more of a contact database versus a CRM system, and didn't have the flexibility and customization capabilities we required," says Suzanne Rabauer, InfoMentis' Director of Business Development and Marketing. As a result, the firm experienced limitations in assigning and scheduling consultants; forecasting sales; organizing and executing marketing campaigns; and managing its pipeline.

SOLUTION

InfoMentis sought a flexible, customizable, easy-to-use, and cost-effective CRM solution. "We really do not want, nor have the appetite for, an incredibly complex or expensive technology environment," says Rick Nichols, Principal. As a dedicated user of Microsoft technologies, InfoMentis turned to Microsoft CRM. "When we looked at Microsoft CRM, a whole new world opened up for us," Rabauer says.

BENEFITS

The firm recently deployed Microsoft CRM 3.0 and has been particularly impressed with its tight integration with Microsoft Office Outlook®. "Our sales principals' daily activities and calendar are scheduled through Outlook. It's very important to them," Rabauer says. "With Microsoft CRM you really, truly can now do everything from within Outlook." Microsoft CRM 3.0 is also playing a critical role in InfoMentis' business development efforts. Using Microsoft CRM, InfoMentis is now able create comprehensive nurture marketing programs, through which every interaction with the client or prospect is tracked and followed up on quickly. "Our clients are our business," Nichols says, "and Microsoft CRM is critical to maintaining contacts, nurturing, selling, and servicing those clients."







"We're much happier with Microsoft CRM."

Microsoft Dynamics CRM 3.0 helps **Tourism Whistler** prepare for the 2010 Olympic and Paralympic Winter Games

COMPANY:

Tourism Whistler
www.tourismwhistler.com

VERTICAL INDUSTRY:

Travel and Tourism / Not-for-Profit

SEGMENT:

Midmarket

COUNTRY/REGION:

Canada

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2000
Microsoft Exchange Server 2000
Microsoft Office 2000
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Ascentium Corp.
www.ascentium.com

SITUATION

"In the marketing and sales business, we live and die by our contacts," says Karen Playfair, Director of Finance for Tourism Whistler, the member-based marketing body for Whistler, British Columbia. The trouble was that the organization's 10-year-old contact management system couldn't efficiently track the organization's contacts. In addition, Tourism Whistler suffered from having too many databases—somewhere between 10 and 15 by Playfair's count—which made critical marketing and membership information difficult to find and share.

SOLUTION

Playfair explains, "We reached a critical point where our employees said, 'Hey, get us something. Either update the Maximizer or get us a new contact management system!' So we examined a lot of products on the market and selected Microsoft CRM. One of the things that really attracted us to Microsoft CRM is that, combined with Microsoft Outlook®, it's just like one product. The fact that it's so closely tied to Outlook is great. In anything else, you'd be duplicating efforts in two separate products."

BENEFITS

By deploying Microsoft CRM—and recently upgrading to Microsoft CRM 3.0—Tourism Whistler is realizing a wealth of benefits that are positioning them to successfully showcase Whistler as part of the 2010 Olympic and Paralympic Winter Games. Client information is readily available to everyone across the member organization, which makes tracking contacts and developing marketing programs a breeze. Plus, customization has been a snap. "We're much happier with Microsoft CRM," says Playfair.

**TOURISM
WHISTLER**

"Microsoft CRM 3.0 automates a lead-nurturing process...that allows us to reach out and touch our clients in a methodical and well-thought-out manner."

Microsoft Dynamics CRM 3.0 helps **RightNow** keep pace with exponential growth

COMPANY:

RightNow Business Development Systems
www.nowstuff.com

VERTICAL INDUSTRY:

Professional Services/
Sales Management Consulting

SEGMENT:

Small Business

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows® Small Business
Server 2003
Microsoft Office 2003
Microsoft Windows XP Professional

MICROSOFT PARTNER:

Workopia, Inc.
www.workopia.com

SITUATION

Today's growing companies are increasingly looking for flexible CRM solutions that can accommodate rapid growth. And by any measure, RightNow Business Development Systems is a growing company. The company's revenues doubled in 2004 and are expected to nearly double again in 2005. Based in Walnut Creek, California, RightNow is a leading provider of training and advisory services to vendors that support the real estate industry. With just a dozen employees, the company didn't think they could afford an organization-wide on premise CRM solution. They desired a more customizable, scalable, affordable CRM system than their Salesforce.com solution offered.

SOLUTION

Based upon this criteria, RightNow chose to deploy Microsoft CRM on Microsoft Windows Small Business Server 2003. "We used to use Salesforce.com, but faced a lot of challenges when it came to product customization," explains Michael Davis, Director of Sales and Marketing. "We migrated to Microsoft CRM so that we could have the ability to easily do deep customizations that would support our business processes." Commenting on RightNow's upgrade experience from Microsoft CRM 1.2 to 3.0, Davis says, "Our partner did the implementation after work hours for us, and it was pretty seamless. I left on a Wednesday night and when I got in Thursday morning Microsoft CRM 3.0 was up and running."

BENEFITS

In addition to its deep customizability, RightNow employees say that Microsoft CRM feels comfortable and easy to use. "We were able to use Microsoft CRM effectively from the beginning because the employees already knew Microsoft Outlook," says Davis. "We doubled our revenues last year and will likely double them again this year. Microsoft CRM is nimble and scalable, which gives me confidence that it can meet our evolving business needs for years to come."

"Microsoft CRM 3.0 automates a lead-nurturing process," states Davis, "that allows us to reach out and touch our clients in a methodical and well-thought-out manner."



"From where I'm sitting, everyone wins with Microsoft CRM!"

Microsoft Dynamics CRM 3.0 helps the **Missouri House** serve their constituents

COMPANY:

Missouri House of Representatives
www.house.mo.gov

VERTICAL INDUSTRY:

Public Sector/Government

SEGMENT:

Midmarket

COUNTRY/REGION:

United States

SOFTWARE & SERVICES:

Microsoft Dynamics™ CRM 3.0
Microsoft® Windows Server™ 2003
Microsoft Exchange Server 2003
Microsoft SQL Server™ 2000
Microsoft Windows® XP Professional

MICROSOFT PARTNER:

Quilogy, Inc.
www.quilogy.com

SITUATION

Responding quickly to constituents' correspondence and concerns is critical for all elected officials. But for members of the Missouri House of Representatives, this important task wasn't easy. The Missouri House had a constituent management system, but it was outdated, couldn't be accessed via the Web, and wouldn't accept attachments. Because of these limitations, only about 30 of the 165 House offices used the system. Instead, members relied upon a combination of homegrown systems, paper files, and written notes. The Missouri House sought a cost-effective, off-the-shelf solution that could streamline and standardize their processes. And because the House is in session only five months of the year, the new solution also had to be Web-enabled, so legislators could respond to their constituents year round.

SOLUTION

The Missouri House identified Microsoft CRM as the solution that best matched their needs. Not only did Microsoft CRM naturally integrate with their existing Microsoft infrastructure, the system was highly customizable. Richard Christman, Deputy Director of Application Development says, "The successes we've had with Microsoft CRM stem primarily from its great flexibility. We have each of our representatives basically operating as an individual work unit and we've been able to customize each work unit to that representative's needs. Previous systems we've had here within the House have been very inflexible, requiring people to adjust their work habits to the model the system was based on."

BENEFITS

"From where I'm sitting, everybody wins with Microsoft CRM. The constituents in the state of Missouri are getting better service, and the representatives are able to respond more quickly and more uniformly with less effort," Christman says. "The legislative assistants are able to control their workflow and spend more time serving and less time typing. And the IT staff spends more time working on other projects and not supporting another application."





ABOUT MICROSOFT DYNAMICS

Microsoft Dynamics™ is a line of financial, customer relationship, and supply chain management solutions that help businesses work more effectively. Delivered through a network of channel partners providing specialized services, these integrated, adaptable business management solutions work like and with familiar Microsoft software to streamline processes across an entire business.

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