



Microsoft Dynamics Customer Solution Case Study



Easy-to-Use CRM System Spurs Employee Data Tracking, Improves Information Accuracy

Overview

Country or Region: United States
Industry: Information management

Customer Profile

Data Reduction Systems designs, develops, and manages a broad range of applications, from specialized micrographic techniques to remote digital input. Based in New Jersey, the company employs 140.

Business Situation

The company's existing customer relationship management (CRM) solution did not integrate well with Microsoft® Office Outlook®. This reduced the adoption and usage of the tool, which led to inconsistent and inaccurate sales pipeline information.

Solution

Managers rolled out Microsoft Dynamics® CRM Online to the firm's sales, telemarketing, and executive groups.

Benefits

- Increased sales
- Simplified data sharing
- Improved business intelligence
- Companywide adoption of easy-to-use system

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Marc Chester, Vice President, Business Development, Data Reduction Systems

New Jersey-based Data Reduction Systems provides data storage archival and retrieval solutions to businesses, including support for server-based business operations such as accounting and solutions specifically for pharmaceutical companies. The company's existing customer relationship management (CRM) solution had not gained traction among employees. The system was difficult to use and managers had to constantly encourage salespeople to enter and update information. With a lack of reliable data, the ability to make sound decisions based on facts had degraded. Moreover, the system had a cumbersome user interface and accessing data and creating reports was difficult. After evaluating CRM solutions, decision makers at Data Reduction Systems selected Microsoft Dynamics® CRM Online. All employees have adopted the new system, and the company now has real-time access to accurate sales data.



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Situation

Data Reduction Systems, based in Union, New Jersey, provides data storage archival and retrieval solutions to businesses. Its offerings support server-based business operations including accounting and solutions tailored to pharmaceutical companies.

The company’s existing CRM solution failed to perform to expectations. The application did not integrate well with the Microsoft® Office Outlook® messaging and collaboration client, a fact that severely curtailed its adoption and use across the company. As an example, employees had to run pipeline reports separately from the CRM application, a cumbersome process. Consequently, employees seldom maintained sales pipeline data. This meant that managers had little useful insight into sales operations, and, as a result, they were unable to identify, and act on, emerging trends.

“It’s key for us as a small business to stay close to the pulse of our sales opportunities because this allows us to accurately plan our production,” says Marc Chester, Vice President of Business Development for Data Reduction Systems. “We needed accurate data to facilitate our product development as well.”

Moreover, with no viable CRM system in place, the company lacked a sales-force automation system that could help the small team function more efficiently and effectively to close sales.

Solution

Determined to resolve these issues, company managers evaluated a number of CRM solution alternatives. The list included Salesforce.com, SalesLogix, SugarCRM, and Microsoft Dynamics® CRM Online.

With this list in hand, managers compared the contenders. Because user adoption was such an important goal, they enlisted user feedback. Together, these groups applied their key criteria to the product reviews: ease of use, seamless integration with Microsoft Office Outlook, and the ability for executives to easily access data and generate reports upon which they could base decisions.

“We ultimately selected Microsoft Dynamics CRM [Online] because our salespeople spend their entire days using Outlook,” explains Chester. “It integrates so seamlessly with Outlook that we knew it wouldn’t be a burden on our employees to learn and use.”

The review team also liked that Microsoft Dynamics CRM integrates so well with other Microsoft Office applications, particularly Microsoft Office Excel® spreadsheet software. “We found that executives would be able to run dynamic reports simply by opening up Excel and refreshing the data without even having to open [Microsoft Dynamics] CRM,” recalls Chester. “They had been clamoring for CRM-based reports to give them visibility into our sales pipelines and to be able to analyze that data.”

The company implemented the hosted CRM solution with the help of New York–based Microsoft Gold Certified Partner Infinity Info Systems. “They did all of our integration with our legacy data along with some customizations of how we wanted our pipeline to look,” says Chester. “They did a fantastic job and had us up and running in seven days.”

In addition to fast deployment, the hosted solution allows the company’s small IT staff to focus exclusively on development duties. Moreover, along with access to the latest features of Microsoft Dynamics CRM, Microsoft provides enterprise-class data

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backup and protection for the company’s critical customer data.

At the operational level, the marketing department uses the Microsoft Dynamics CRM marketing module to create and manage campaigns. “The CRM solution allowed us to run queries and run what we call ‘Laser Campaigns’—highly targeted mini-campaigns that might touch 100 prospects,” explains Chester. “We’ve been pleasantly surprised with the success of those.”

The next step in the process is for telemarketing employees to use the CRM system to follow up on marketing campaigns. When the representatives speak with sales leads, they qualify them and, where appropriate, promote them to an opportunity. Microsoft Dynamics CRM then assigns it to a salesperson who completes the next appropriate task and, ultimately, closes the sale.

Benefits

“The Microsoft Dynamics CRM Online solution helped us achieve all the objectives we set for ourselves on this project,” says Chester. “It’s improved the productivity of our users, increased our sales figures, and improved the quality of the information available to our executives.”

360-Degree View Aids Employee Collaboration

The sales process follows a standard methodology and passes leads from marketing groups to telemarketing groups and to sales groups. Detailed notes bolster the performance of employees along each stage of the sales process.

Single Source of Data Simplifies Use and Data Sharing

Previously, employees used multiple applications to consolidate customer data

into reports. Microsoft Dynamics CRM replaced an array of spreadsheets, documents, and employees’ memories to provide a single repository of customer data for users.

Collection of Customer Data Enhances Business Intelligence Capabilities

Employees now use the CRM solution to capture customer data. Consequently, anyone can use the system’s powerful query and reporting capabilities with confidence. Decision makers and managers can slice, dice, analyze, and act on data. Further, with the solution’s reporting capabilities, executives can easily run their own dynamic reports.

Easy-to-Use Solution Delivers 100 Percent User Adoption

Managers credit the exceptional integration of Microsoft Dynamics CRM with Office Outlook and easy-to-use user interface with driving a full adoption rate. “One of our main reasons for choosing Microsoft Dynamics CRM [Online] was the fact that the Outlook integration was so tight,” says Chester. “That’s helped to drive a 100 percent user adoption rate. Better still, the tool has helped us more intelligently run our sales, marketing, and business operations.” This has resulted in:

- **Significantly shortened training time.** With a shortened time-to-proficiency, employees can discover more quickly the benefits of the CRM solution. Managers cite a significant increase in the number of employees who are happy to update pipeline report data. That corresponds with a profound decrease in the time spent cajoling employees to use the CRM solution.
- **Accurate, real-time access to data.** The solution replaced an inaccurate view of

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For more information about Infinity Info Systems products and services, visit the Web site at: www.infinityinfo.com

For more information about Data Reduction Systems products and services, visit the Web site at: www.drscorp.com

sales and sales pipeline data with a precise, real-time view.

- **Increased productivity with workflow-based automation.** Managers created workflows that automate a number of processes, such as the automated creation of quotes and a billing document for the firm's accounts payable department.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

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