

Vision. Expertise. Results.



Client Solution

Industry: Information Technology Services
Company Size: 180 Employees
Estimated Annual Revenue: \$24 Million

Challenges:

- Current Client Relationship Management (CRM) System was outdated and had never been adopted by users due to challenges with the design and configuration
- Second Foundation's goal was to help client to build on the investment in CRM 3.0 and leverage the effort into a more robust, functional application that would allow for the management and growth of their current customer base.

Solution:

- Microsoft Dynamics CRM 2011
 - Setup of the opportunity lifecycle for the sales team
 - Once adopted by users- initiation of SharePoint workflows for contract management and integration with Microsoft Dynamics GP for select data sets

Competition:

- Salesforce.com

Benefit to Client:

- Leverage existing technology and investment
- Users have ability to self manage pipeline
- Managers will have increased access to data and specific data cycles at their fingertips
- Integration of technology platforms- gives extension from current investment
- Make processes and access to information easy

Future Benefit to Microsoft:

- Current Microsoft Silver Partner will require 20-25 new licences in the future based on company's trending growth
- Continued adoption of SharePoint workflows and GP integration will further enhance loyalty to Microsoft Stack