

CASE STUDY

Packaged Application Services: Microsoft CRM Solution
Executive Search Firm

ABOUT EMTEC®

Emtec is the right size provider of technology-empowered business solutions for world-class organizations. Our local offices, highly-skilled associates, and global delivery capabilities ensure the accessibility and scale to align your technology solutions with your business needs. Our collective focus is to continue to build clients for life: long-term enterprise relationships that deliver rapid, meaningful, and lasting business value.

PACKAGED APPLICATION SERVICES

Emtec is a leading implementer of Packaged Applications. We help reduce costs by streamlining processes and providing application package expertise. We partner with our clients to provide subject matter expertise around the entire lifecycle of your application. Our specialty practices include Microsoft Dynamics, Salesforce, Oracle Cloud (Fusion), PeopleSoft, eBusiness Suite, Hyperion and OBIEE.

- ERP
- HCM
- CRM
- BI
- Planning
- Financial Management

Microsoft Partner

Gold Enterprise Resource Planning
Gold Customer Relationship Management

A leading Executive Search Firm for midmarket organizations looked to improve their search and recruiting results with improved communication, visibility and tracking of high-end executives.

BUSINESS CHALLENGE

Limitations in the legacy system forced the client to manage the sales process in separate spreadsheets, thus preventing the advantage of collaborating on sales opportunities. Sales activities were haphazardly recorded in separate sections, making it difficult for management to design reports on the progress of opportunities.

The company needed a recruiting candidate module to assist in managing the various senior executive contacts that lie at the core of their services. These candidates were originally managed using spreadsheet tools and Microsoft Office.

In addition, there were few marketing options available to the client with the legacy system, such as e-mail campaigns and mail merges. Most campaign activities were recorded in spreadsheets, or in an individual's Outlook sent folder. This process thwarted accurate reporting on the success of marketing campaigns.

There were various other limitations with the legacy system that needed to be addressed.

- The interface of the legacy system was accessed through an application window that was not user-friendly.
- The IT Administrator did not have access to customization options to create or modify fields.
- The infrastructure of the legacy system could not provide adequate scalability to allow room for future growth.

The ideal scenario for managers was to address all of these issues within a fixed budget and time period. Emtec was responsible for analyzing and documenting these process changes and transforming them into functional specifications.

THE SOLUTION

Emtec, utilizing its world-class consulting services, project methodologies and innovation, worked concurrently with managers at each stage of the project. We employed a tailored Rapid Deployment Plan using the Microsoft Sure Step Methodology to ensure success.

Data from the legacy system was imported to a development environment for testing to ensure integrity. Microsoft Dynamics CRM was then configured to address each of the client's goals for the project. The sales process was standardized in CRM to facilitate data entry and ensure accurate reporting. Using the built-in customization tools, Emtec created a custom Recruiting Module within CRM that provided them with an effective system for tracking their senior executive contacts. The Outlook CRM Client was added to each workstation to provide the best means of tracking contacts, e-mail conversations and appointments. Reports were recreated and enhanced in CRM to present real-time data snapshots. Emtec employed the "Train-the-Trainer" approach to impart best practices.

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RESULTS

Users almost immediately recognized the advantages to using Microsoft Dynamics CRM within their organization. They presently track all their contacts and activities from within the familiar interface of Outlook. Sales and Marketing managers have full visibility over the pipeline and campaigns. The client also now has a tailor-made Recruiting module to administer its senior executive contacts. The Rapid Deployment Plan employed by Emtec achieved all of these objectives within the original timeframe and budget.

TECHNOLOGY

This innovative solution requires:

- Microsoft Dynamics CRM
- Windows Server
- SQL Database Server

For a user workstation, Internet Explorer 6 and above is required. Microsoft Office is recommended to take advantage of the full integration features with Microsoft Dynamics CRM.