



Microsoft Dynamics Customer Solution Case Study



Overview

Country: India

Industry: Marketing and Research Services

Customer Profile

Machwan Communication & Research (MCR) provides market research solutions, along with data management, response management, and HR services. The company has grown more than 75 percent in revenue YoY and is one of the fastest growing companies in its domain.

Business Situation

Keeping in mind the growing business, MCR needed to nurture leads effectively and efficiently. It needed an efficient CRM system that could improve existing relationships with its customers and help to increase the business in the future.

Solution

MCR worked with Microsoft® Gold Certified Partner Religare Technova to implement a customized CRM system based on Microsoft® Dynamics™ CRM 4.0.

Benefits

- Provides centralized data repository
- Increases revenue by 10 percent
- Improves quality of MIS reports
- Increases sales productivity by 20 percent

Research Company Implements CRM Solution to Improve Business Process

“The improved ability to track sales activity, systematically follow up leads and target communications has increased our chances of reaching the crucial step in the sales process thereby increasing our revenues by 10 percent.”

T K Pandey, Managing Director, Machwan Communication & Research Pvt. Ltd.

Machwan Communication & Research (MCR) is a complete database solutions company built on quality principles of repeatability and reproducibility. The company provides multi disciplinary services under one roof. However, its data was distributed across several systems, and thus salespeople found it difficult to retrieve and record vital sales information, which resulted in inefficient sales and service processes. Due to lack of reliable data, the ability to make sound decisions based on facts had degraded. To solve these problems, MCR worked with Microsoft® Gold Certified Partner Religare Technova to develop a highly customized customer relationship management application based on Microsoft® Dynamics™ CRM 4.0. The solution provided quick and simplified collection of data, which resulted in better quality in the reporting system. Management now has much more sales information available for decision making. In addition, more efficient business processes have resulted in additional time savings and improved data quality.



“As employees spend less time searching for information they now focus on strengthening customer relationships resulting in increasing sales productivity by 20 percent.”

T K Pandey, Managing Director, Machwan Communication & Research Pvt. Ltd.

Situation

Machwan Communication & Research (MCR) provides a full suite of custom business intelligence, database, and CRM solutions to address their client's critical business needs. Started in 2002, MCR has grown more than 75 percent in revenue YoY. Today, with more than 200 people and offices in Mumbai, Lucknow, Delhi, Hyderabad, and Gurgaon, MCR is one of the fastest growing companies in its domain.

MCR offers quality research solutions tailored to meet their client's needs and necessary insights to help them develop effective marketing strategies. The company provides multidisciplinary services under one roof ranging from data management solutions, lead generation, tele prospecting, market research and loyalty programs.

“We have a large network spread all across the country that caters to our clients' needs,” says T K Pandey, Managing Director, MCR. “Our comprehensive capabilities, proactive client service and ability to provide accurate, actionable results set us apart from the rest.”

Project teams at MCR were maintaining leads and follow-up details in Excel spreadsheets. Data files were not centralized, which resulted in accumulation of duplicate data and unauthorized data access. The system had limited data management capabilities, which meant information was not stored or used effectively.

There was a lack of transparency because uniform data management was non-existent. Managers had no visibility into the sales pipeline and therefore, compiling data for reports was a time consuming process. Running campaigns and capturing their responses was also a tedious task with Excel files.

To enhance market presence, MCR needed to nurture leads effectively and efficiently. “Our goal at MCR is to enable customers achieve their goals faster by providing information that matters at the right time with highest quality and at the lowest possible cost,” explains T K Pandey. “With the growing business requirements, we needed a relevant system that delivers high quality lead management, customer service, data security, and MIS reports.”

To address these challenges, the company needed an efficient CRM system that could improve existing relationships with its customers and help to increase the business in the future. MCR thus decided to implement a comprehensive, all-in-one solution that would provide employees with quick access to unified data and which could be used to guide sales more efficiently.

Solution

Determined to resolve these issues, MCR decided to implement a new infrastructure based on Microsoft® Dynamics™ CRM 4.0. “By choosing to deploy Microsoft® Dynamics™ CRM 4.0, we knew that we will have a robust solution that will easily integrate with the existing system and deliver best quality services that support business operations,” says T K Pandey.

With the help of Microsoft® Gold Certified Partner Religare Technologies, MCR implemented the technology solution to help improve its sales process.

MCR chose to deploy Microsoft® Dynamics™ CRM 4.0 because it best met their requirements for lead nurturing and marketing. The company found Microsoft® Dynamics™ CRM 4.0 as a perfect framework, to build comprehensive and customized CRM solution.

Other factors that convinced MCR to select Microsoft® Dynamics™ CRM 4.0 include:

- Sophisticated set of building blocks for sales, marketing and service
- Flexible workflow that cuts across and ties modules together
- Role-based security across business entities
- Highly customizable platform

The solution provided basic approach into lead management, opportunities management, account and contact management, marketing and campaign management, service and case management, and reporting automation.

Data import/update web applications were created for uploading data available in Excel files into CRM which is a recursive task for MCR. In addition, many plug-ins were created for various business process like unique customer and account ID generation, lead nurturing ID etc.

“Microsoft® Dynamics™ CRM 4.0, which is used all across the globe by various customers for automating business processes, met our biggest requirements of organizing, storing, and accessing customer data effectively,” says T K Pandey.

Some of the key features of the solution are:

- Centralized data repository: It provides a centralized data repository that can be accessed for sales, marketing and service activities.
- Improved e-mail campaign: It helps to roll-out targeted marketing campaign using Quick Launch functionality. Additionally, it also helps to collect and manage campaign responses efficiently.
- Increased business opportunities: It helps to increase business opportunities by tracking all potential customers efficiently.
- Improved business management: Expanded capabilities such as end-to-end

relationships and workflow have helped MCR to improve all existing business processes.

- Increased market research: It provides accurate information on leads, opportunities, accounts, and contacts. This helps MCR to quantify its market presence.
- Flexible and customizable solution: Flexibility of the solution empowers the company to build a sophisticated solution that reaches beyond the realm of customer relationship management.

Employees credit the exceptional integration of Microsoft® Dynamics™ CRM 4.0 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 4.0 was the fact that the Outlook integration was so tight,” says T K Pandey. “That’s helped to drive a 30 percent user adoption rate.”

Starting on 1st June 2008, the project was completed in three months. It was implemented at the Gurgaon branch for MCR. The modules implemented were, Sales and Marketing. However, most of the modules are using custom entities according to their business needs.

The solution took care of the following requirements of MCR:

- Creating a flexible, easy and instant reporting mechanism
- Centralizing data which is secured in terms of user access and access/privileges modifications at any given point of time
- Uploading excel file on frequent basis with data update functionality
- Connecting other branch offices with the solution for instant data capturing in a central place
- Exposing some of the data over the Internet for its clients

By centralizing all of the company's customer contacts, Microsoft® Dynamics™ CRM 4.0 provides MCR with the holistic view of its customer base that it previously lacked, and has helped improve sales reporting and forecasting.

Benefits

Being built on a sophisticated line-of-business application platform; Microsoft® Dynamics™ CRM 4.0 provides all required services and functionalities upon which developers can build custom solutions tailored to specific business needs.

Provides Centralized Data Repository

Microsoft® Dynamics™ CRM 4.0 has replaced an array of spreadsheets, and documents to provide a single repository of customer data for users. The solution provides a centralized data repository that can be accessed for all sales, marketing and service activities.

"With all sales data held in a central repository, our employees now have a 360-degree view of customer profile, history and purchases and can develop personalized products and services," says T K Pandey.

Increases Revenue by 10 Percent

With Microsoft® Dynamics™ CRM 4.0 MCR has a tool that amplifies its resources and efforts, removes obstacles to growth, and takes full advantage of the company's talented staff in meeting customers' needs.

"The improved ability to track sales activity, systematically follow up leads and target communications has increased our chances of reaching the crucial step in the sales process thereby increasing our revenues by 10 percent," says T K Pandey.

Improves Quality of MIS Reports

The detailed reporting functionality in Microsoft® Dynamics™ CRM 4.0 allows

management to see exactly what is going on in areas such as sales process and performance at any given time. Increased access to accurate, up-to-date and complete information has dramatically improved decision making and strategic planning.

The solution facilitates MCR to track and generate MIS reports faster and in turn reduces the turnaround time. The reports are more detailed and are available more quickly.

Increases Sales Productivity by 20 Percent

MCR has increased employee productivity and improved customer service by establishing a single reliable database. With an integrated CRM system, sales representatives and executives have a complete view of their customers with accurate, up-to-date information.

"With access to a comprehensive record of a customer's account, employees can answer customer queries quickly, and sales executives can better target potential areas for cross-selling and up-selling products," explains T K Pandey. "As employees spend less time searching for information they now focus on strengthening customer relationships resulting in increasing sales productivity by 20 percent."

For More Information

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For more information about Religare Technova products and services, write to connect@religaretech.com or visit the Web site at: www.religaretech.com

For more information about Machwan Communication & Research products and services, call +91 11 45400818 or visit the Web site at: www.machwan.in

About Religare Technologies

Religare Technologies is the IT services business of a large diversified Indian transnational business group. The group pursues aggressive business interests globally in IT products (Religare Technova) Financial Services (Religare Enterprises), Health Care (Fortis Health Care), Wellness (Religare Wellness, formerly Fortis HealthWorld), Diagnostics (Super Religare Laboratories, formerly SRL Ranbaxy) and Aviation and Travel (Religare Voyages).

The Religare Technologies umbrella includes offerings in Business Solutions, Infrastructure Solutions, Business Process & Knowledge Services & Information Services.

Currently with over 2000 employees and presence in over 10 countries, Religare Technologies is poised to be a leader in the global IT Services space. Religare Technologies focuses on clients in key verticals such as Financial Services, Insurance, Capital Markets and Health Sciences (Health Care and Pharmaceuticals)

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

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM 4.0

Hardware

- IBM Server
- Processor – Intel Xeon 1.86 GHz (32 Bit)
- RAM – 3 GB
- Hard Disk – 146 GB

Partner

- Religare Technologies

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