



## Microsoft Dynamics CRM Case Study



### Overview

**Country:** Germany

**Industry:** Services

**Employees:** 25

**Number of PCs:** 25

### Company

The Sparkassen Network Consulting Bayern GmbH, with about 25 employees, is the consulting firm of the Bavarian Savings Bank Association. It supports savings banks and associations across the country by offering assistance in terms of process or sales optimization.

### Software & Services

- Microsoft Dynamics CRM

### Partner

proMX GmbH

### Customer Relationship Management

## CRM Software Manages Consulting Business

“Thanks to proRM and Dynamics CRM, we are able to save on average 15 percent of the present working hours in each of our business areas. This way, we can react faster and offer improved services to our customers.”

Rudi Wolf, IT-Projektleiter at snc Bayern GmbH.

### Initial Situation

Unlike the branch offices of commercial banks, savings banks do not belong to large financial groups. They are rather considered as institutions governed by public law, by municipalities or by municipal special purpose-associations. Accordingly, the savings banks' business model is regionally oriented: It is less about investment banking, but rather to service the basic needs of local people and companies. Savings banks are supported and advised by regional associations. For the 72 savings banks in Bavaria with up to 3,000 branches and 46,000 employees, it is the Bavarian Savings Banks Association. Its consulting services are bundled in the wholly owned subsidiary named Sparkassen Network Consulting (snc) Bayern GmbH.

### Requirements

For a long time, there was no consistent strategy in place to technically organize the company's consulting business. For example, group appointments and tasks were planned by using Outlook whereas working plans were created in Excel sheets. Additionally, a CRM application was used for the management of

customer addresses as well as for project time tracking and billing. "The many data sources were quite complex and confusing. The high administrative expense increased the burden on our employees," remembers Wolf. In mid 2010, the consulting firm decided to merge the distributed data within one unified CRM software. "We intensively looked for a suitable solution at the CRM Expo in Nuremberg. This proved to be not that easy," adds Wolf. While it was quite simple to find adequate solutions for customer management, most of them failed to meet the company's high requirements within the project management area. For example, snc required the integration of its employee database in order to consider qualifications and availabilities already during the tender phase. What is more is that the entire sales process with all its phases needed to be documented in the customer file in a comprehensible manner.

### Solution

The project team has finally found the right solution – proRM an industrial solution for consulting companies based on Microsoft





Photo: Sparkassen Network Consulting Bayern GmbH GmbH

*Thanks to proRM und Microsoft Dynamics CRM the consultants of snc today benefit from von efficient processes.*

#### Microsoft-Partner

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Dynamics CRM. The contract for the implementation was awarded to the Microsoft partner proMX. "The decisive factor was that with this software we were able to implement exactly what we needed. Dynamics CRM and proRM also convinced us because they offered practical integration into Outlook. Employees can directly enter their working hours in their Outlook calendar which is very convenient," explains Wolf.

The CRM implementation project was launched in April 2011. The project team was able to transfer the existing data to Dynamics CRM only within a short period of two months. "About 85 percent of our requirements were already covered by the standard application. The few changes which were required from a technical perspective were almost only form customizations," underlines Wolf. Instead, the process depth was reduced within the sales area. Initially, a multi-step administrative process was required from initial contact to final completion. "During the course of the project it became clear that it is much easier to establish business opportunities for medium-sized savings banks. Therefore, we were able to free our employees from unnecessary tasks," remembers Wolf.

#### Conclusion

The proRM and Dynamics CRM systems have been in use now since early summer 2011. Since then, the 25 snc employees only need to work with the native client integrated in Outlook. Thanks to the new CRM software, the consulting firm has succeeded in consolidating all customer-

facing areas, such as Marketing, Project Accounting, Customer Service, Project Management, and Sales, within one integrated platform. By covering the entire value-added chain, transparent customer and project data are always available to all employees. For example, management dashboards provide information on the current status of the sales pipeline, the goals achieved or the man days worked for a specific project. "Today, we are not only better informed but also have more confidence in our figures and numbers. The degree of automation has increased significantly. The less manual intervention is needed, the fewer mistakes are made," explains Wolf.

Thus, snc was able to eliminate several steps during invoicing and significantly streamlined its Project Controlling area. Wolf: "Thanks to proRM and Dynamics CRM, we are able to save on average 15 percent of the present working hours in each of our business areas. This way, we can react faster and offer improved services to our customers." snc gives an excellent testimonial for its software partner: "proMX is a sympathetic and dynamic company. They have always responded in a flexible manner to any short term changes and assisted us with professional advice." It is hardly surprising that the first follow-up projects are already planned only six months after having introduced the new software. For example, snc plans to refine Personnel Time Planning and to further develop Project Controlling. In the medium term, snc intends to provide integration into Microsoft Project.

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