



MICROSOFT CRM

Client: Client is a Non- Profit Firm based In Australia

Project: A Microsoft Dynamics CRM 3.0 implementation that is tightly integrated with Microsoft Outlook 2003 and other legacy systems.

Project Description: Microsoft Dynamics CRM 3.0 was implemented by ESS at Customer to provide the single source of client and donor information that was previously lacking in their CRM product and various paper-based tracking systems. Capitalizing on the tight integration of Microsoft Dynamics CRM with Microsoft Outlook 2003, the users were able to quickly adapt to the new system by using the intuitive, common Outlook interface that was already implemented at the client site. Custom application development was used to migrate existing data, integrate further with existing legacy systems and develop custom reports.

Scope of Work

Scope of Work	Microsoft Dynamics CRM 3.0 was implemented by ESS
Technology/ Environment	<ul style="list-style-type: none">•System Structure: Client/Server•Database: MS SQL•Operating System: Windows•Middleware: IIS• Programming language: ASP.NET
Project Duration	5 Months
Team Size	1 Project Leader, 1 Developer

Challenges

Using a combination of Microsoft Office Legacy CRM system, they did not have an efficient way to track donor information Which Created daily hours of administrative task for the employees excel spreadsheets, paper document.

Solutions

Microsoft Dynamics CRM 3.0 was implemented by ESS at Customer to provide the single source of client and donor information that was previously lacking in their CRM product and various paper-based tracking systems. Capitalizing on the tight integration of Microsoft Dynamics CRM with Microsoft Outlook 2003, the users were able to quickly adapt to the new system by using the intuitive, common Outlook interface that was already implemented at the client site. Custom application development was used to migrate existing data, integrate further with existing legacy systems and develop custom reports.



Results

- On-demand reporting of vital donor Statistics that previously took two months to compile.
- Increased field time for the staff because of decreased paper work.
- Availability of data in a mobile Environment.
- Targeting marketing and communications That were not possible in the previous