



## SOLUTION BRIEF

### Customer Profile

GPEC and its members work to market Greater Phoenix as an ideal regional economy for high-quality companies, with a talented, technologically advanced and diverse workforce.

### Business Situation

Microsoft CRM has enabled GPEC to improve the accuracy and completeness of their contact information, as well as increase efficiency and deliver visibility to staff members worldwide.

### Solution

- > Microsoft Dynamics CRM
- > ePartners JumpStart for Microsoft CRM

### Business Benefits

- > Increased visibility to information
- > Automated data entry
- > Accurate and shareable data
- > Consistent interface accessible from any location
- > Flexible application for a growing nonprofit company

### Industry

Service Organization

## ePartners Success Story

# GPEC and ePartners: Serving Non-Profits with Microsoft CRM



The Greater Phoenix Economic Council (GPEC) serves to attract quality businesses to Greater

Phoenix and champion foundational efforts to improve the region's competitiveness.

Managing communications with prospective businesses and investors from around the world was a challenge for GPEC, using an Access-based in-house application for contact management. They needed a more robust CRM application to handle their customer relationship activities, especially since there was often an overlap between investor and business recruiting efforts. The GPEC team identified several issues around their contact management and investor opportunity management, including the need for a higher degree of sharing and automation, a centralized database for investor contact information, a communications system to distribute and track messages sent to current contacts, better organization and tracking of shared contact databases, online/offline integration with Outlook, and a simple interface to speed the adoption of the new CRM package.

## ePartners Success Story

# GPEC and ePartners: Serving Non-Profits with Microsoft CRM

### Solution

Maury Rice, Director of Information Systems at GPEC, sought a CRM application that his company would not outgrow quickly. He selected Microsoft Dynamics CRM for its flexibility, automation, and scalability, and for Microsoft's generous Open License Charity initiative. He also opted to engage ePartners to implement the solution using their accelerated Microsoft CRM JumpStart program. JumpStart is ePartners' streamlined methodology to implement basic sales force automation for clients. The JumpStart approach helps ensure quick success with Microsoft CRM, and provides a platform from which to expand the functionality.

The project was designed to be completed in two phases. Phase One enabled GPEC to perform contact management tasks such as activity tracking, relationship history, opportunity management, email tracking, mail merge, and Outlook synchronization. This initial phase was completed under time and 60 percent under budget — a level of savings that was particularly helpful for nonprofit GPEC.

Rice said, "Phase One was primarily about installing and adapting Contact Management. ePartners helped us to modify the process, because unlike other sales organizations we do not have a tangible product. The other challenge is that GPEC is on the smaller end of the Microsoft CRM's target customer spectrum."

### Business Benefits

The new CRM software has enabled GPEC to gain visibility in all the activities the organization performs in the marketplace

thanks to sales force automation. In sales organizations where product sales are generally tied to compensation, sales representatives are more likely to enter their activities into the CRM application. However, at businesses like GPEC, which does not sell a physical product, employees can find it challenging to enter all their activities, especially when doing so requires cumbersome manual data entry. With Microsoft CRM, GPEC can automatically assign types of activities such as email correspondence to specific customer accounts, which allows the company to automate data entry and to know that the data is accurate.

Microsoft CRM features a Web-based browser, which works independently of the end user's email client or location. GPEC employees travel around the world. However, no matter where they log on to Microsoft CRM, the interface remains the same. Working with a simple, familiar interface at all times is a big help for employees and boosts user adoption.

"ePartners is great and turned out to be a very good partner for GPEC," Rice said. "Their consultants were very responsive, and took the time to understand our business model and what we were trying to accomplish. Then they provided solutions that worked."

### Future plans

GPEC will build on their current functionality in Phase Two of the implementation. This will address opportunity management and sales workflow, including lead and opportunity management and workflow, custom pipeline reports, and document management.



After more than a decade of arming its customers with a competitive advantage, ePartners has established itself as the largest global Microsoft Business Solutions consultancy in the world. From aligning their clients' business and IT strategies; to improving business processes; and deploying and supporting solutions that accelerate business results, no other Microsoft Business Solutions partner offers more comprehensive information technology solutions and services than ePartners. Last year alone more than 300 leading companies spanning 45 industries, turned to ePartners for strategic business solutions and consulting services. Visit [epartnersolutions.com](http://epartnersolutions.com) to view additional case studies

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