



## IT Consulting Firm Deploys Scalable CRM Solution, Gains Control of Sales and Marketing

### Overview

**Country or Region:** United States  
**Industry:** Professional services

### Customer Profile

Vitalize Consulting Solutions, Inc., delivers IT solutions to healthcare organizations through a methodology that involves listening, advising, and strengthening customers in the pursuit of strategic IT initiatives.

### Business Situation

Poor performance of Sage ACT! prevented Vitalize's salespeople from using the system efficiently and restricted the company from tracking, managing, and forecasting sales activities effectively.

### Solution

The company's internal staff and field sales teams broadly adopted Microsoft Dynamics CRM to support better management of sales and marketing activities and to increase visibility into company performance.

### Benefits

- Timely, accurate reporting
- Improved sales management
- More efficient campaign management

*"From a total-cost-of-ownership perspective, including support and management on the IT side, our shift to Microsoft Dynamics CRM has been huge."*

*Eric Eagnet, CIO, Vitalize Consulting Solutions*

Vitalize Consulting Solutions, Inc., provides IT staff, system optimization, and technology and integration work for healthcare providers. As the company grew, its Sage ACT! system was unable to support the demanding tasks that employees needed to perform to move the business forward. Vitalize chose to replace the system with Microsoft Dynamics CRM, which was well received by employees because of the solution's integration with Microsoft Office Outlook. Previously, performance issues with ACT! had discouraged many salespeople from using the system; today, inside and field sales have embraced Microsoft Dynamics CRM, making visibility into vital information much easier. As a result, management can more effectively track and direct the day-to-day business development activities, and executives can more accurately forecast revenue and manage sales, marketing, and recruiting efforts.



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Cyndi Cahill, Senior Vice President of Marketing and Sales Support, Vitalize Consulting Solutions

## Situation

Vitalize Consulting Solutions, Inc., provides IT staff, system optimization, and technology and integration work for healthcare providers, hospitals, and large physician practices. The company maintains ambitious growth plans, adding consulting practices every year. Vitalize originally deployed Sage ACT! customer relationship management software, but as the company continued to grow and evolve, adding more people and establishing more practices, it quickly outpaced the capabilities of the ACT! program.

In particular, as the size of the contact database and the number of users multiplied, system performance suffered to the point that sales staff and business development directors no longer used the application. Eric Egnet, CIO of Vitalize, explains, “The application, because of the size of the database, was really dragging down people’s laptops and the server. It became problematic.”

Saddled with slow performance, salespeople used the application less and less, and the company’s ability to track and manage its pipeline degraded. In addition, because it no longer captured all of the information from the field, senior management could not rely on the system to provide accurate reporting or forecasting. “I’m not bad-mouthing ACT!; it’s a great product for a small company,” continues Egnet. “It just outlived its stay within our organization.”

## Solution

Egnet, who has overseen successful enterprise resource planning and customer relationship management deployments at other organizations, arrived at Vitalize after a merger with another company. He inherited Vitalize’s solution search, evaluating several products—including

cloud-based customer relationship management applications—that promised better performance, sophisticated functionality, and reduced support costs. As incoming CIO, Egnet had a vision for a homogenous environment standardized on the Windows platform and Microsoft technology stack.

The company already uses Microsoft Office Outlook for messaging and calendar functions and plans to deploy Microsoft Dynamics AX in January 2011. Given its seamless integration with both products, Microsoft Dynamics CRM was a logical choice.

Egnet turned to Microsoft Gold Certified Partner Green Beacon Solutions to deploy the solution and perform the configurations and customizations required to integrate Microsoft Dynamics CRM with existing business systems. “Given Vitalize’s stated technology direction, Microsoft Dynamics CRM was a perfect fit,” explains Richard Smith, Vice President of CRM Strategy at Green Beacon. “The company’s vision of a homogenous IT environment is reinforced by an on-premises CRM solution that runs on Microsoft SQL Server and extends the functionality of Office Outlook. Going forward, Microsoft Dynamics CRM will also provide a solid base for integration with core modules for Microsoft Dynamics AX, such as Financials and HR.”

Today, Vitalize uses Microsoft Dynamics CRM at all levels of the organization—from business development directors in the field, to inside sales and marketing staff, to the executive offices.

## Sales Performance Management

Vitalize captures leads through a variety of channels, including events, e-mail campaigns, and Web site queries. As new leads come in, an internal support team

creates an entry in Microsoft Dynamics CRM and assigns the lead to the appropriate salesperson.

The support team also uses Microsoft Dynamics CRM to track and assign tasks related to existing accounts. After logging on, salespeople receive notifications about new leads and scheduled activities related to existing customers or prospects. Within Microsoft Dynamics CRM, a salesperson can choose to act on assigned tasks, scheduling phone calls, sending follow-up e-mail messages, routing contracts for sign-off, or simply identifying open opportunities. Because actions are recorded in the centrally managed customer relationship management database, the entire team can see the status of a specific client or an individual opportunity.

"Our salespeople can actually see their full slate of assigned activities and use the solution to plan their day," explains Cyndi Cahill, Senior Vice President of Marketing and Sales Support at Vitalize. "And it enables them to more efficiently schedule their time. We can track and manage actions from a central location, which has reduced e-mail traffic and constant 'phone-tag' situations and nearly eliminated any mystery about what's going on with a particular client."

#### **Executive Insight**

Vitalize management takes a keen interest in sales activities, tracking deals and monitoring the sales pipeline. The ability to accurately forecast future activity has implications from revenue projections to resource planning. Reporting and dashboard tools provide insight into active and planned activities, open opportunities, and work in progress with existing clients.

The leadership team uses this information to guide the actions of line-of-business

units, such as marketing, recruiting, and human resources. "Our management team can now see who's doing what, where new opportunities are surfacing, and which clients are active," explains Egnert. "We pass this information to our recruiting team to fill gaps or look at our marketing efforts to identify which campaigns are generating leads and which are wasting money."

#### **Marketing**

By using the ExactTarget e-mail marketing engine that Vitalize integrated in Microsoft Dynamics CRM, the company's two-person marketing team efficiently manages targeted campaigns. The centrally managed contact database has eliminated tedious manual processes by which sales and marketing used spreadsheets to identify recipients for each campaign and then reentered contact names into ACT!

"We try not to market to any one customer or prospect more frequently than every other week," explains Jennifer Verdiani, Sales and Marketing Associate at Vitalize. "So, it's important that we carefully manage and structure our campaigns. Now, we simply tell the business development directors to look in Microsoft Dynamics CRM, view the list for a specific campaign, and remove anyone we don't want to target."

#### **Benefits**

By using a solution that provides superior performance and a sophisticated feature set, Vitalize now better manages its sales and marketing efforts and enjoys deeper insight into operations at a lower cost of ownership than its previous system.

#### **Timely, Accurate Reporting**

Vitalize's employees and salespeople in the field have rapidly adopted Microsoft Dynamics CRM. Because the solution now captures virtually all leads and sales

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Eric Eagnet, CIO, Vitalize Consulting Solutions

activities, managers can run reports against more timely, more accurate information. As a result, company management benefits from better forecasting and better insight into past performance.

“Our salespeople actually had a valid excuse for not using ACT!; it would completely bog down their machines and our servers,” recalls Eagnet. “Today, we're getting more—and more viable—information, so we are able to drill into the sales reports. We feel much better about our visibility into that data than we did previously.”

#### **Improved Sales Management**

With improved visibility into sales performance, Vitalize more effectively manages its field at company, regional, and individual levels. “Sales performance is certainly more quantifiable now,” says Eagnet. “We can look at all the information in the system from a pipeline perspective and use it to track activities by individual. In this way, we're using Microsoft Dynamics CRM as a tool to drive their processes. We really want our business development directors and our management team to find value in the system, and I think we're getting there.”

#### **More Efficient Campaign Management**

By linking Microsoft Dynamics CRM to ExactTarget, an e-mail marketing engine, Vitalize has eliminated the manual processes that drove its marketing campaigns and can now more effectively target the recipients of a specific campaign. When launching an e-mail campaign, the company's marketing team quickly identifies a subset of the customer and prospect database without relying on spreadsheets that have circulated among inside sales and business development directors. In addition, campaign management and tracking features help the marketing team measure the results of a particular campaign and ensure that individual customers are not receiving too many mailings, either physical or e-mail.

#### **Lower Cost of Ownership**

The superior performance of Microsoft Dynamics CRM has also reduced the time that Vitalize internal IT staff spends managing and supporting the solution, resulting in significant cost savings. “Our IT staff was plagued by issues with ACT!,” recalls Eagnet. “From a total-cost-of-ownership perspective, including support and management on the IT side, the shift to Microsoft Dynamics CRM has been huge.”

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Vitalize Consulting Solutions products and services, call (610) 444-1233 or visit the Web site at:

[www.getvitalized.com](http://www.getvitalized.com)

For more information about Green Beacon Solutions products and services, call (617) 485-5000 or visit the Web site at:

[www.greenbeacon.com](http://www.greenbeacon.com)

## 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:

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### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM

### Partners

- Green Beacon Solutions