



Microsoft Dynamics Customer Solution Case Study



Overview

Country or region: India

Industry:

Customer Profile

Integra Global Solutions, a business process outsourcing company that offers bookkeeping, accounting, financial research, medical billing & transcription services to its customers in United States, Canada, Europe and Australia. It employs 180 people in 3 shifts to provide round the clock services.

Business Situation

Integra India was using Microsoft Office. The company wanted to share customer data across its offices and track opportunities to closure more accurately

Solution

ATNA Technologies, a Microsoft Certified Partner deployed Microsoft Dynamics CRM 4.0 Professional Server.

Benefits

- Supports global business needs
- Simple to use
- Reduces costs
- Increases productivity

Business Process Outsourcing Company Supports Global Business and Extends Reach

“Our customers expect a high efficiency and accurate information. Microsoft® Dynamics™ CRM 4.0 has enables us to maintain higher efficiency and improve it in the future.”

Ganesh Ranganathan, Chairman, Integra Global Solutions

Integra Global Solutions provides customized business process outsourcing (BPO) solutions. Headquartered in Pennsylvania, United States it has operation centres in Coimbatore, India. The company wanted to streamline its sales and marketing functions, to create a seamless pipeline that takes leads to closures. To do so, ATNA Technologies, a Microsoft Certified Partner implemented Microsoft Dynamics CRM 4.0 Professional Server. A simple implementation lasting only one week has resulted in better planning and pipeline management, contact management has resulted in a more efficient sales team. The company has seen an immediate acceptance of the new solution with its integration with Microsoft Office applications and a manifold increase in efficiency of business processes such as sharing relevant business information across its offices worldwide.



"Greater visibility means there is better planning and even better execution. This will ensure that leads and prospects generated through marketing campaigns are taken to the logical conclusion and converted to customers."

Aravind Kumar, Director, Integra

Situation

Integra Global Solutions (Integra), a business process outsourcing company provides world class, affordable business solutions. It's headquartered in Pennsylvania, United States, has and a sales and marketing office at Berkshire, United Kingdom with operation centers at Coimbatore, India. It offers an increase in business service levels for processes such as book keeping, accounting, medical transcriptions, financial analysis, data entry, software development, claims processing etc while reducing the cost by as much as 50 percent for its customers.

Apart from cost considerations, it has promulgated outsourcing of non-core services to a great extent. "We believe that putting the company's core values into practice creates lasting benefits for all of the clients and provide the clients with consistent value", says Rajesh Velayuthasamy, Director - United Kingdom Operations, Integra.

For its internal use Integra was using Microsoft Office 2003 to manage data while Tally, a locally available financial solution was used to manage all accounting and financial requirements of the operations in India.

There was no central repository to manage clients contact information, manage opportunities and leads, and update information from its growing sales and marketing organization. There was an urgent need for a solution that would centralize information and create business processes that could be followed across the offices; as well as provide real time information to its employees across the world. "New services and solutions are fundamental for Integra to improve services and customer satisfaction. We needed a tool to enable us to offer new services quickly and improve on the existing services to meet routine business requirements", says Aravind Kumar, Director, Integra.

Solution

Integra evaluated salesforce.com and Microsoft® Dynamics™ CRM 4.0. "We were impressed by the features and functionality of Microsoft Dynamics CRM. But the decision was unanimous when we saw the ease with which the tool integrates with Microsoft Office Outlook and Excel," explains Ram Prakash, Director, Integra Global Solutions.

ATNA Technologies, a Microsoft Certified Partner, studied business processes and operations at Integra and suggested an offsite onsite model for implementation of Microsoft Dynamics CRM 4.0 to cut down costs. Integra wanted the system to be operational within a short span of time. Thus, ATNA Technologies completed a vanilla implementation of CRM 4.0 within a span of one week at its Coimbatore location. Sales and marketing modules of Microsoft Dynamics CRM were implemented.

ATNA Technologies suggested that Integra use standard features and identify areas that required customization which could be handled in subsequent phases. "This allowed us to implement the solution and then decide enhancements and customizations based on employee feedback," elucidates Aravind Kumar, Director.

To ensure that sales & support staff in United Kingdom and United States are able to access the Dynamics CRM solution, ATNA Technologies implemented Microsoft Dynamics CRM Internet Facing Deployment Configuration tool. This creates an Internet Facing Deployment (IFD) for Microsoft Dynamics CRM 4.0.

Benefits

Microsoft Dynamics CRM helped Integra to replace the existing legacy system with an integrated business solution “Our customers expect a high efficiency and accurate information. Microsoft® Dynamics™ CRM 4.0 has enables us to maintain higher efficiency and improve it in the future,” comments Ganesh Ranganathan, Chairman, Integra Global Solutions

Increases Productivity

With Microsoft® Dynamics™ CRM allows employees to manage contacts, e-mails, appointments and tasks in a consolidated business application. This means that employees don't have multiple data sources and processes to manage appointments with prospective customers. Also, the management has immediate access pipeline status and can forecast far more accurately. “The productivity increase is far more visible in an organization such as ours with offices in three different time zones and the leadership split across the three locations,” explains Aravind Kumar, Director, Integra Global Solutions.

Supports Global Business Needs

Integra's leadership team is able to retrieve data from a well-structured database with real time information. This enables the sales and marketing leadership to support each other to meet the business goals of the organization. “Greater visibility means there is better planning and even better execution. This will ensure that leads and prospects generated through marketing campaigns are taken to the logical conclusion and converted to customers,” remarks Aravind Kumar.

Simple to Use

Microsoft Dynamics CRM consolidates the all held in disparate systems, and centralises all the contact information and detailed profile of each customer. This means it possible to acquire client requests and filter it on

typology, client, priority, and other parameters, irrespective of the channel used by the customer.

Integration with Microsoft Office Excel allows employees to import relevant information to Office Excel worksheets and refresh it from live Microsoft Dynamics CRM data. “We can have real time information in an Excel worksheet and refresh this with the current Dynamics CRM data with a click of a button, using dynamic data connections,” notes Aravind Kumar.

Reduces Costs, Improves Top Line

“Microsoft Dynamics CRM has increased employee productivity, streamlined business processes,” explains Aravind Kumar. “Higher efficiency in operations, better insight into trends will enable us to take the right business decisions, and help us reduce costs and accelerate growth.”

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 who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. 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

For more information about ATNA Technologies products and services, call (91) (80) 25254554, (91) (42) 22231010, or visit the Web site at: www.atnatechnologies.com

For more information about Integra Global Solutions products and services, call US - Toll Free (877) 423 3872, UK - (0207) 993 8112 or visit the Web site at: www.globalintegra.com

About ATNA Technologies

ATNA Technologies, a group company of Teknoturf, a premium software training organization. ATNA Technologies is a Microsoft Certified Partner that brings the best practices in Microsoft Dynamics by effective consulting and superior understanding of customer needs. Its solutions are tailored to meet the requirements of its customers. A unique combination of superior consulting and delivery skills ensures value for money and faster ROI for its customers.

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
- Microsoft Server Product Portfolio
 - Windows Small Business Server 2003
- Microsoft Office System
 - Microsoft Office 2003

Hardware

- IBM xSeries 3500: 2 gigabytes (2GB) RAM, two 250 GB hard disk drives

Partner

- ATNA Technologies

Microsoft Dynamics