



**Customer**  
Champion Solutions Group

**Products and Services**  
Dynamics CRM for Sales  
Microsoft Services  
Office 365

**Industry**  
Consumer Goods

**Organization Size**  
Medium (50 - 99 employees)

**Country**  
United States

# IT consultants bolster customer-centric culture by deploying online CRM solution

Champion Solutions Group is an independent IT solutions provider focused on cloud and virtualization services as well as data management solutions that reduce costs, increase productivity, and mitigate risks. When an evaluation of sales practices revealed that employees were struggling using the company's Oracle Siebel system, Champion's leaders decided to look for an alternative.

After evaluating Salesforce.com and SugarCRM, the company chose Microsoft Dynamics CRM Online and used the switch as an opportunity to refine its teamwork approach. Now, every employee has access to a single repository of customer information in an easy-to-use system, which helps it improve relationships with clients and prospects. Champion also benefits from a solution that its IT team can easily customize to meet its growth goals.

## Situation

"Think with one mind, and speak with one voice." Chris Pyle, CEO of Champion Solutions Group, coined this phrase to capture his philosophy of customer interaction. "Delivering superior results on time and on budget is a team effort, the result," he explains.

"Deploying very complex technology solutions while in growth mode requires us to maintain an extremely high degree of internal collaboration and a lean-thrust focus on client and prospect relations."

And the philosophy has been working: Champion Solutions Group, which designs and deploys technology solutions for virtualization, data management, and cost and risk management, grew its active client base by 42 percent in 2011. During this time, however, the company found that its Oracle Siebel CRM software was unable to support its collaborative vision or its aggressive growth. In particular, the company noted an increasing gap between marketing and sales. "We were doing a tremendous amount of marketing, but Siebel lacked a systematic way to help us gauge the quality of leads," says Pyle.

This rift was exacerbated by a complete disconnect between the Microsoft Outlook email application and the cumbersome Siebel CRM system. "For various reasons, people weren't routinely using Siebel, but they were using email." The two applications lacked integration, so they weren't always capturing important data on opportunities and leads in Siebel.

To improve collaboration and support growth, Champion needed a new solution that would address the drawbacks of the Siebel CRM system, which included:

## Location-dependent connectivity

While traveling for a sales meeting or making an on-site service call, employees could access Siebel only from a Citrix platform and only if local network security didn't block the port that Citrix uses. Bill Phelps, CIO of Champion Solutions Group, adds, "The version of Siebel we had locked access through the web, so staff had to wait until they got back to the office to enter leads or update customer records."

## Difficulty finding information

With customer contact histories, service requests, contracts, and other information stored in various places such as in email, the Siebel database, or document repositories, employees spent considerable time finding, tracking, and recording data. In addition, the employees were fluent in the obscure query language that Siebel uses to generate reports, forcing them to rely on Champion's overtaxed IT department to create them. "The IT team fielded hundreds of requests for queries and reports," says Phelps.

## Outdated, inflexible software that was difficult to integrate and customize

Company leaders could foresee difficulty and high cost for integrating Siebel with other applications. "Siebel lacked flexibility and mobile features, and it wasn't going to keep up with the demands of our sales, marketing, and technical teams," notes Pyle.

## Solution

To nurture its culture of teamwork, Champion Solutions Group sought to replace Siebel with a single, integrated software application that would support its combined goals of delivering superior client services, customer retention, and continued company growth. After evaluating Salesforce.com and SugarCRM, Champion deployed Microsoft Dynamics CRM Online because of its ability to integrate with other Microsoft productivity software. All of the company's 138 employees use the solution to perform daily job functions, including sales, marketing, pre-sales and post-sales service engineers, maintenance, channel operations, project managers, accounting, and even IT staff.

## An end-to-end business tool

By deploying Microsoft Dynamics CRM Online, Champion has taken advantage of core customer relationship management (CRM) functionality, including client communications, lead tracking, sales force automation, marketing automation, easy-to-use queries, and workflow creation. In addition, salespeople and service engineers in the field can access the system from anywhere there is an Internet connection, and they can access a local version when they are offline. "With Microsoft Dynamics CRM Online, we have everything we would expect from a powerful CRM solution," says Pyle.

Champion's use of the online solution extends far beyond traditional CRM functions. With it, staff members can access everything they need to do their jobs, including email, documentations, contracts, leads, project management, project and payroll timekeeping, and more. "We rely on interoperability between Microsoft software applications, and we've further tailored Microsoft Dynamics CRM Online to integrate with previously-disparate systems to create a truly unified, single access point to line-of-business functions," remarks Phelps.

By unifying the information that was previously stored in personal inboxes, document repositories, and the Siebel database, Champion has given various disciplines and departments the ability to share and access information from a single view. For example, by connecting Microsoft Dynamics CRM Online to Microsoft SharePoint Server 2010, the company has provided its employees with access to process documentation such as proposals, contracts, and other materials from within the CRM solution. In addition, Phelps and his IT team took advantage of the solution's APIs to connect the solution to the company's enterprise resource planning (ERP) system, giving people access to data workflow-type reporting.

The Champion IT team also developed custom modules for project management, expense reporting, and timekeeping within the CRM system. A combination of prebuilt and custom workflows automates and guide people through certain activities.

The connection between Microsoft Dynamics CRM Online and Microsoft Outlook has proven to be a key factor in unifying sales and marketing, helping Champion meet growth goals while impressing service to existing clients. "With Microsoft Dynamics CRM Online, we aren't asking people to do something vastly outside of their normal workflow or data tasks, or to do duplicate entry into multiple applications."

## Making the selection

Pyle had first-hand experience with SugarCRM, one of a subsidiary company, Managed Maintenance. After a detailed evaluation of Microsoft Dynamics CRM Online, Salesforce.com, and SugarCRM based largely on usability and functionality, Pyle implemented Microsoft Dynamics CRM Online at Managed Maintenance as well.

Champion was intrigued by the interoperability of Microsoft Dynamics CRM Online with other Microsoft software and the ease of integrating it with other systems, tools, and specialized point solutions through its use of open, standard APIs and availability of custom entities. This ultimately helped Champion refine its "one mind, one voice" approach to customer relations and service, Phelps elaborates. "With alternative CRM solutions, we would have been unable to integrate with Outlook or SharePoint Server without a lot of effort and expense."

## Simple migration

Champion migrated 10 years' worth of Siebel data to Microsoft Dynamics CRM Online in just 12 hours by using data migration and import features in the solution from Microsoft. "The Data Migration Manager for Microsoft Dynamics CRM Online is terrific," Phelps enthuses. "We developed the queries ourselves and, during the course of about a month, conducted a few test migrations. Everything went smoothly. It's really that good and easy to use."

## Benefits

Champion plans to continue its growth trajectory for managed services revenue with a goal to win 25 new clients in 2012. "To achieve our growth goals, we needed an integrated marketing, sales, and customer relationship management tool," says Pyle. "We are confident in the ability of Microsoft Dynamics CRM Online to help us undertake and manage this growth."

## Promoted customer satisfaction through relationship-based marketing and sales

Champion now better promotes client and prospect interactions across services and sales. Before, when Champion staff used email to communicate with clients and prospects, contact histories and other customer data were scattered across personal email folders. With Microsoft Dynamics CRM Online, employees have a complete relationship record located in one place and anyone with appropriate privileges can access email messages or contact records linked to a particular contact or opportunity. This centralized approach to relationship management promotes faster, more accurate responses to service requests and other inquiries and ultimately helps support the company's growth and customer retention goals. Pyle elaborates. "If a customer calls in response to an email from Bill and Bill is in training, the person who answers the phone can access the email message and help the customer on the spot, rather than later a message. This is something we never used to do with Siebel, and I didn't see the capability in Salesforce.com or SugarCRM."

In addition, whether interactions happen via email, phone, or in person, the full history of interactions is available along with a customer's portfolio of products and services.

To help sales and marketing achieve growth goals, Champion deployed a digital-marketing lead-scoring add-in from SalesFUSION that works with Microsoft Dynamics CRM Online. It scores leads based on customer and prospect responses, such as clicking on a link, downloading a white paper, visiting a website, or scrolling in a webinar. "Marketing can give sales a real-time view of what is happening with their accounts and leads. When someone exceeds a certain score based on their responses, a workflow in Microsoft Dynamics CRM Online creates an automated prompt that suggests the sales rep to contact that person," explains Pyle. In addition, Champion has taken advantage of the solution to streamline administrative tasks and sales processes so that salespeople can focus their time on selling. "Since deploying Microsoft Dynamics CRM Online, we've closed the gap between marketing and sales and brought it all together," says Pyle.

## Increased productivity and responsiveness

Champion increases the productivity of its entire company by giving people one central place to access what they need to meet client needs. "Before, we had a file repository, email, and CRM," explains Pyle. "Where do you go? How do you find your stuff? With Microsoft Dynamics CRM Online, employees have a complete relationship record located in one place where everyone can think with one mind and speak with one voice with regard to customer interaction, having it all in one location so that everyone understands where to look has increased our productivity and responsiveness."

Says Dan Taylor, CRM Solution Specialist at Champion Solutions Group, "Employees have more time that they can spend on more fulfilling and beneficial tasks. They experience a higher degree of job satisfaction because they have tools that are geared to work with that help them accomplish their daily tasks more easily."

One area where Champion has taken advantage of Microsoft Dynamics CRM Online to fuel productivity and customer service is the solution's easy-to-use reporting tools. These tools help users design and run queries themselves. "Queries, Filters, and Advanced Find in Microsoft Dynamics CRM Online essentially hand it to you on a platter, making these tools accessible for everyone and quickly making complex feel like experts," says Phelps.

Champion takes advantage of Microsoft Online Services, specifically Microsoft Office 365. By using these productivity and collaboration services located in Microsoft data centers, Champion bolsters competitive advantage and employee efficiency.

Pyle says, "By moving messaging to the cloud, we've reduced costs, reassured employees to more productive areas, and gained peace of mind about service availability."

## Avoided risk, gained an advantage

Regarding risk, Champion believes that it made the right choice at the right time to replace its Siebel system and provide increasingly better responsiveness to its clients. "Any time you replace a critical business management application that you've been using for more than 10 years, there's risk," Pyle reminds. "But the reward we're seeing in flexibility, mobile capabilities, and other features outweighs it."

Speaking from the CIO perspective, Phelps says, "Although people in my role often ask questions about the safety of data hosted in the cloud, I'm comfortable with Microsoft Dynamics CRM Online because Microsoft has hundreds of people monitoring security that work together. It helps me dream about how we can further improve productivity and better help our clients. The ease with which we can tailor Microsoft Dynamics CRM Online makes it possible to realize many of these ideas."

## Provided the IT team with an adaptable solution that is easy to tailor and administer

Champion is using steering committees to gauge adoption, provide training on advanced features and functionality, and further refine, enhance, and tailor-fit the solution to employee needs. "We hear and we listen," says Phelps. "If people need something new or different, we can tailor Microsoft Dynamics CRM Online quite easily because it gives us freedom within a framework. Therefore, it's really easier to fulfill these requests than it was in Siebel."

Regarding what may still be possible with Microsoft Dynamics CRM Online, Pyle adds, "As CIO, I'm always thinking about ways that we could use CRM even more in our business to even greater benefit, because while using Microsoft software applications that work together, it helps me dream about how we can further improve productivity and better help our clients. The ease with which we can tailor Microsoft Dynamics CRM Online makes it possible to realize many of these ideas."

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—Chris Pyle, CEO  
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