RUFFALO
NOEL LEVITZ

RUFFALO NOEL LEVITZ USES MICROSOFT DYNAMICS CRM TO TRACK THEIR DATA-DRIVEN COMMUNICATIONS, HELP MAXIMIZE THEIR CLIENTS' FUNDRAISING EFFORTS, AND BUILD LONG-TERM RELATIONSHIPS

ABOUT THE ORGANIZATION

Ruffalo Noel Levitz is the recognized leader in providing strategic fundraising and enrollment management services. Fundraising services include: management of student phonathons, off-campus calling programs, CAMPUSCALL software for phonathons, phonathon training and consulting services and planned giving identification programs. Enrollment management services include: search, qualification and a full complement of direct marketing services and tools. Delivering proven results since 1991, Ruffalo Noel Levitz is one of America's fastest growing private companies with more than 3,000 employees in 85 locations.

CHALLENGE

Ruffalo Noel Levitz was looking for a CRM solution and with 20 years as a Microsoft partner, Microsoft Dynamics CRM was the first place they looked. "We considered partnering with other companies and considered building a solution from scratch, but really Dynamics CRM was the only one we considered as a platform. At the time, Dynamics CRM was still very young—it was on version 1.2, but we liked the direction it was going and that's why we stuck with it," says Keith Beindorf, Enrollment Management Product Owner at Ruffalo Noel Levitz. "We started developing our own product on top of CRM version 3 and we have kept upgrading over the years."

Ruffalo Noel Levitz has an ISV (Independent Software Vendor) relationship with Microsoft and provides an Enrollment Manager as their product, which acts as a vertical solution for college and university enrollment management. The organization conducts strategic fundraising and enrollment management services for institutions around the world. Their extensive system requires millions of workflows daily and due to the flux of demand during their busy seasons, their solution needed to scale.

The organization originally hosted their Dynamics CRM solution in-house and managed their own data center and servers, but eventually the team sought out a partner that could host instead. "We looked for partners who really knew Dynamics CRM. We wanted to find a partner with deep CRM experience who could build out a system that could scale. We found PowerObjects through the Microsoft channel, and as regular attendees of Convergence and partner conferences we heard a lot about PowerObjects and their reputation in the community—and that attracted us," says Beindorf.

Overall, Ruffalo Noel Levitz needed a solution and partner that would:

+ **Provide on-premise hosting of Mircosoft Dynamics CRM and on-demand support**
+ **Create a scalable system that could handle millions of workflows daily**
+ **Help deliver and manage extensive marketing campaigns, fundraising efforts, and event management on behalf of their clients**
+ **Easily integrate with the Microsoft stack and other industry tools**

CHALLENGE

Ruffalo Noel Levitz needed a scalable CRM system hosted by a partner that could provide on-going support.

SOLUTION

Microsoft Dynamics CRM

BENEFITS

+ Provide on-premises hosting of Microsoft Dynamics CRM and on-demand support

+ Create a scalable system that could handle millions of workflows daily

+ Help deliver and manage extensive marketing campaigns, fundraising efforts, and event management on behalf of their clients

+ Easily integrate with the Microsoft stack and other industry tools

POWER OBJECTS

SOLUTION

Ruffalo Noel Levitz transferred their entire EMP infrastructure from their own data center to the data center at PowerObjects. "Initially our plan was to build out our infrastructure within PowerObjects' data center, but we discovered that building up one massive server system wasn't scaling well. We worked with the PowerObjects team and Microsoft and decided to scale the system horizontally rather than vertically using server stacks. We currently have four stacks of servers that we spread things across in order to scale the system. We're now seeing much better results," says Beindorf.

Ruffalo Noel Levitz manages over 300 college and university databases and on average, they import over 1 million new student records monthly. With their extensive system hosted at PowerObjects, Ruffalo Noel Levitz relies on the PowerObjects support team to keep their systems running at high efficiency. PowerObjects has been providing on-demand support—along with weekly awareness strategy meetings to keep ahead of any potential issues, make updates, and maintain servers.

BENEFITS

After moving their system to PowerObjects servers and putting together a server framework that could scale effectively, Ruffalo Noel Levitz has seen improved performance. "In our system, we have workflows that shoot off thousands of other workflows. Essentially, we've been able to get to a point where we are processing 5 to 6 million workflow rules a night across all of our organizations. In the past, we tried to do that and it wasn't successful—it was just too much for a single stack of servers to handle. Now with PowerObjects hosting our servers, we are seeing great performance across the board," Beindorf says.

Ruffalo Noel Levitz manages marketing campaigns on behalf of the many colleges and universities they have as clients. These campaigns do everything from helping to generate more inquiries and more applications to qualifying applicants. Each of these campaigns are made up of dozens of workflows, emails, HTML template emails, and phone calling components—including telecounseling, where outbound phone calls are made from call centers to qualify someone or encourage them to apply. The large amount of data processed and communications triggered each day requires server power and with PowerObjects' on-premises hosting, this system is more stable. "We are doing all these different activities for each of our clients' standard and custom campaigns. We end up sending about 160 million personalized emails out of Dynamics CRM annually. A lot of those are automated based on response of a student to a campaign or a phone call that generates a specific set of emails," adds Beindorf.

ABOUT POWEROBJECTS

Established in 1993, PowerObjects is one of a handful of organizations recognized as a leader in delivering Microsoft Dynamics CRM/xRM solutions to customers. PowerObjects fully embraces the power of customer choice and offers hosted, on-premise and online CRM deployment options.

PowerObjects provides CRM solutions to businesses and non-profit organizations in multiple industries including healthcare, life scienes, insurance, financial services, publishing, distribution, manufacturing and professional services.

AWARDS + RECOGNITION

2012 + 2013
Microsoft Dynamics Partner of the Year

+++

2011 + 2013 + 2014
Inner Circle for Microsoft Dynamics

+++

2009 + 2010 + 2011 + 2012
Inner Circle for Microsoft Dynamics

+++

3
Convergence Customer Excellence Awards

+++

GOLD + SILVER
Inner Circle for Microsoft Dynamics

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BENEFITS |continued|

The organization is able to integrate Microsoft Azure with Dynamics CRM for their event management services. "We use Microsoft Azure for as much of our public facing work as we can. We have an event registration module where students register for events. All of that is housed in Microsoft Azure and data gets pulled into CRM. This helps with the scalability we need during academic peak times when it is the busiest time of year for events. We are able to do that for a number of our public facing applications where we know we will have large numbers of students logging in."

With Microsoft Dynamics CRM and PowerObjects as a partner, Ruffalo Noel Levitz is able to continue to focus on providing excellent service for their clients. The organization can efficiently track their data-driven communications, help maximize their clients' fundraising efforts, and ensure that all their programs are running smoothly, while continuing to build long-term relationships with their client base. With PowerObjects' on-premises hosting and support, it is now much easier for Ruffalo Noel Levitz to manage and conduct large quantities of workflows and communications daily.

"One of the main reasons we chose to partner with PowerObjects was because we knew they had the CRM expertise we were looking for and that they would really be able to dig into the unique things we are doing," says Beindorf. "We have access to the right resources quickly and easily with the PowerObjects team. Our questions are answered quickly and the team is always responsive during those situations. We have found the whole PowerObjects team to be both very accessible and well qualified for what they are doing."

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KEITH BEINDORF
Enrollment Management
Product Owner
Ruffalo Noel Levitz

POWER OBJECTS