



## Microsoft Dynamics CRM is a Perfect Prescription for Healing Productivity Ills for **HST**

HST develops and markets clinical and financial management software applications for the healthcare industry in the United States. The creation of in-house applications resulted in separate data silos for sales, marketing, finance, and operations. As the company grew, this led to operational inefficiencies that hampered interdepartmental communication and employee productivity. Managers evaluated six CRM solution alternatives and chose to deploy the Microsoft Dynamics CRM on-premise solution for marketing, sales, and customer service users. It met their criteria for a single data repository of customer information, Office Outlook integration, ease-of-use, and tools to enhance productivity.

### **BUSINESS NEEDS**

Like most software development companies, managers made the decision to create their own sales and operations applications. While that served the company well 10 years ago, over time discrete data silos for sales, marketing, operations, and financial content were created, hampering internal efficiency and communication. The sales force, for example, needed to communicate with their service colleagues to ensure that a positive customer experience continued after the sale. And the service team needed to keep closer tabs on the status of outstanding issues. "In order to facilitate interdepartmental collaboration I knew that we needed to replace our legacy data silos with a centralized data source," says Karlene Ochoa, vice president of operations for HST.

The company's sales and service personnel use Microsoft Office Outlook heavily in their daily operations to close new sales and ensure customer satisfaction. These employees were also intimately familiar with the Office Outlook interface so any new solution would need to integrate well with it.

### **SOLUTION**

Corporate managers began evaluating a number of alternatives. In addition to having a centralized database and seamless integration with Office Outlook, they wanted to offer their mobile sales force easy access to the CRM application. And they wanted to be able to quickly scale the number of users to 200. Based on these factors, managers selected the Microsoft Dynamics CRM on-premise solution.

The review process was made much easier because the company itself develops software applications for the healthcare industry. "We're using the same tools that Microsoft developers used to create Microsoft [Dynamics] CRM," explains Ochoa. "We felt that we had the expertise and experience to apply an in-depth analysis to whether the solution would fit well in our environment. In our experience, the back end, middle tier, and GUI will make or break an application if you want to scale it. The Microsoft solution passed those tests."

Another reason for favoring the solution was that Microsoft Dynamics CRM "allows more configuration than most products in the field right now," says Ochoa. "We're inserting data elements on our pages that include information specific to our industry. That was very easy to do right out of the box."

The company has a very mobile sales force that is looking to leverage the remote capabilities of the application. "Our salespeople love their laptops and we wanted to ensure they had online and offline access to data," explains Ochoa. "With Microsoft [Dynamics] CRM they now have access to a real-time status portal with information on customers, prospects and referrals."



The new solution replaced volumes of Office Excel spreadsheets, which sales reps had to manually reconcile each week. Time spent on this administrative task cut into time spent with prospects and customers. "A lot of our data was sitting on C drives versus a centralized location and that made version control impossible," remarks Ochoa. "It took many hours per week per sales person to update the information, assuming everyone did what they were supposed to do."

Marketers are using the marketing module to compile distribution lists based on specific criteria for newsletters, faxes, direct mail, and phone calls. "The marketing module makes it very easy to set up, track and tabulate results for campaigns," explains Ochoa. "We could have done that with our legacy systems but it would have been time prohibitive to extract, collect, and track that data."

The use of the Microsoft Dynamics CRM service module is just as vital to the company. "We have clients who call for software support," says Ochoa. "The service module generates case numbers and tracks an issue until it's resolved. That gives us and our customers the confidence that things are being handled. Our veteran help-desk people have adapted quickly to the service module and to date I literally haven't had one complaint from them about it."

## BENEFITS

By leveraging the marketing, sales, and service modules of Microsoft Dynamics CRM, the company's managers have been able to garner a number of specific benefits.

- Centralized data repository—The solution provides a single location for customer data that may be accessed for sales, service, operations, finance, and marketing activities. This has eliminated the severe data silo problem managers previously grappled with.

- Visibility into accounts to capture more sales—The solution gave managers visibility into account data that allowed them to identify a marketing gap. The company had been ignoring new construction medical center prospects. Sales personnel are now working this segment, which represents an estimated \$1 million in potential revenues.
- Workflows boost employee productivity—Managers set up a workflow that automatically creates an opportunity and assigns it to a person for follow-up. The legacy manual process took 10 minutes to complete this task but the automated process takes less than a second.
- Enhanced customer satisfaction—Tracking and reporting on service issues resolves them faster. Moreover, service issue data can be aggregated to support the development of best practices to further the company's service reputation in the industry.
- Minimal customization and ease of maintenance save development costs—"The out-of-the-box CRM application is so easy to configure that I call it 'tailorization' versus what people normally associate with costly customization," explains Ochoa. "We can do that in house with minimal effort."
- 360-degree account view enables interdepartmental collaboration—Now that account data can be accessed in a single location, employees across departments can review, and act upon, all the data associated with a customer.
- Ease of use—The application is based on a familiar Microsoft platform that is very intuitive. Thus, user adoption is high while training time is minimal.

**"We use the very tools to develop our own software that Microsoft used to create Microsoft [Dynamics] CRM. That helped us evaluate the many solutions we considered and choose Microsoft as the best solution for our company."** Karlene Ochoa, Vice President of Operations, HST

## COMPANY

HST  
[www.hstpathways.com](http://www.hstpathways.com)

## VERTICAL INDUSTRY

Healthcare

## SEGMENT

Small Business—15 employees

## COUNTRY/REGION

North America

## SOFTWARE AND SERVICES

Microsoft Dynamics CRM 4.0  
Windows Server 2003  
Microsoft Office 2003/2007  
Microsoft Exchange Server 2003  
Microsoft SQL Server 2005  
Windows XP and Windows Vista

## MICROSOFT PARTNER

Workopia, Inc.  
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