



## High-End Real Estate Company **JBMRA** Puts Mobile Brokers in Prime Position to Increase Sales—with Microsoft Dynamics CRM Live

### SITUATION

JBMRA—Sperry Van Ness Institutional (JBMRA) specializes in the marketing of high-end real estate properties in the United States. Sales depend upon the ability of brokers and agents to promote these properties and work knowledgeably with prospective buyers. As properties become available, agents and brokers accessed the firm's Office Outlook public folders and records kept in Office Excel spreadsheets. "Our legacy systems had a ridiculous amount of contacts and data," says Derrick Dike, director of information technology services at JBMRA. "Our data was a corruption waiting to happen, and I knew we needed to migrate to an effective long-term CRM solution."

### SOLUTION

Dike's past experience and research led him to do trials with Basecamp, Salesforce.com, and Microsoft Dynamics CRM Live. He chose the Microsoft solution because it best met his criteria. "Microsoft [Dynamics] CRM [Live] integrates with our Web site to capture visitor data and allow us to follow up with them," explains Dike. "We also like that it's highly configurable and allows us to tailor our contact and account fields to suit our specific data needs. The application's support for our highly mobile brokers was another big plus."

### BENEFITS

Microsoft Dynamics CRM Live eliminated the risk of losing decentralized customer data. The firm's information is protected on Microsoft-hosted servers that utilize reliable data backup processes and technologies. The application allows mobile users to access and input data on the move, something that brokers could not do previously. They can do offline background synchronization with Office Outlook. Moreover, brokers can immediately log notes about a client walkthrough, which another broker can later access to tailor the presentation of a property to their prospect. From an IT perspective, Dike likes the hosted solution. "Microsoft [Dynamics] CRM [Live] is not a burden on our limited IT resources. It also synchronizes data well among offices. That's something I had problems with using other applications."

**"Microsoft [Dynamics] CRM Live allows our mobile brokers to access and use customer data offline and to collaborate with each other to close sales."**

Derrick Dike, Director of Information Technology Services, JBMRA – Sperry Van Ness Institutional

#### COMPANY

JBMRA – Sperry Van Ness Institutional  
[www.jbmra.com](http://www.jbmra.com)

#### VERTICAL INDUSTRY

Real Estate

#### SEGMENT

Small Business—20 employees at JBMRA

#### COUNTRY/REGION

North America

#### SOFTWARE AND SERVICES

Microsoft Dynamics CRM Live (Microsoft-hosted deployment)  
Windows Server 2003  
Microsoft Office 2003 and 2007  
Microsoft Exchange Server 2003  
Windows XP and Windows Vista

#### MICROSOFT PARTNER

Workopia, Inc.  
[www.workopia.com](http://www.workopia.com)

