

CASE STUDY



Professional Services

Microsoft Dynamics CRM





Improved information transfer between companies of the organization.

Case Study

Demain Foundation

Comercial

Microsoft Dynamics CRM

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Project scope and business needs

Demain is a foundation focused on education, environment and culture, with short-term results and impact on the population. The foundation arises as an answer to the needs of Costa Rica as a developing country. Founded in 1991, a union that developed between coffee plantations and theaters. The foundation became involved in protected wilderness areas and public schools in Costa Rica, in order to bring about a positive change. Also, Demain Foundation owns companies to generate income to the foundation, namely Agualogica, Expressive Theater and Services Link.

Demain Foundation, previously, started business relationships with another company which installed the CRM system. As this relationship did not produce good results, the managers decided to terminate this relationship. With the arrival of AlfaPeople, advisory

process began addressed to strengthening systems' bestpractices, because previously they were mixing ERP and CRM. The aim was to have a more fluid relationship with the customer, because the foundation consists of several inter-related companies. Within the Project, Demain Foundation, Agualogica, Expressive Theater, and Link Services were involved. In the future it is expected to integrate CRM with accounting information of the organization

Demain Foundation decided to implement Dynamics CRM because they did not have a tool that would allow them to have a proper capture from customer information.

Also, due to the absence of a system within the foundation, assigning tasks such as scheduling customer visits, assigning installations and run basic, such as control service orders, record the required inputs for sales, record inventory movement, among others, made it difficult to manage information internally.

Before implementing Dynamics CRM, they had a system that was a mix between ERP and CRM, which did not allow the organization to adequately manage and control information and proper registration of resources.

By installing Dynamics CRM, they have been able to carry out activities in detail. In addition, collaboration and coordination of different areas of the organization have been more agile, so supervisors have greater vision over their respective areas of work.



"We are very pleased with AP, the difference with other companies in the field of technology and training is that they have an adequate system focused on needs and implementation."

Daniel Samper, Executive Director
in Demain Foundation

Solution

Dynamics CRM began operating in only one third of the organization's companies. It is expected that in the short term, Dynamics CRM will be installed in other companies in order to achieve a smooth exchange of information between the foundation's organizations.

To implement Dynamics CRM in Demain Foundation, AlfaPeople required to have:

1. Installers y license CRM Server 2013 and CRM Server 2015.
2. CRM server, IIS and SQL Server installation and configuration ready, because the previous system had an old version.

AlfaPeople carried out the migration from CRM 2013 to CRM 2015 and CRM2015 installation, SQL and Server Operating System CRM2015.

The project involved the implementation of the following modules:

- A. Sales Module: Potential Clients, Accounts, Contacts, Activities, Opportunities and Reports ;
- B. Marketing Module: Campaigns, Express Campaigns, Marketing List, Product Catalog and Knowledge Base (Sales Documentation) ;



C. Service Module: Cases;

D. Settings module: Mail templates, users, Roles, Personalizar el Sistema, Procesos, Paneles, Graphics Settings Module: Mail Templates, Users, Roles, System to customize, Processes, Panels, Graphics.

To develop training to end users, AlfaPeople took 16 hours of training, consisting of 4 x 4 hours sessions, and further evaluation on the last day of training. This training began on January 25, 2016 and ended on January 29, 2016 .

"The foundation has little time using the CRM system; however, the administration is very much satisfied because internal processes speed up significantly."

Daniel Samper, Executive Director
in Demain Foundation

Benefits

Agility in information Exchange

By Dynamics CRM, capturing the customer information has been more fluid and allowed a better relationship with customers from every foundation's organization. Assigning tasks is easy using CRM.

Assigning tasks

Assigning tasks to different areas of the organization, such as orders, requests, scheduling visits and others has been easy, and has allowed a better control of existing resources.

Head officers have greater control over their departments

Dynamics CRM has enabled a greater collaboration and coordination between the different areas of the organization, and supervisors have gained a wider vision regarding their activities.

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