



## The Norris Group Lands Microsoft Dynamics CRM Online to Efficiently Develop Up-Sell Opportunities

Ten years of customer history and order data were “held hostage” by an online e-mail marketing vendor. New anti-spamming restrictions plus an unstable platform riddled with bugs introduced costly errors and lacked vital features The Norris Group needed. The database progressively degraded after the real estate company’s managers brought the data in house. When it crashed, chunks of data the company painstakingly collected over 10 years were lost. That spurred a comprehensive search that identified two CRM solution alternatives. The ease of use and hosted option tilted the decision in favor of Microsoft Dynamics CRM Online. Since migrating to the new solution, marketers eliminated direct mail to 75 percent of the company’s least profitable contacts.

### BUSINESS NEEDS

The Norris Group managers felt “locked in” with an online marketing vendor. They relied upon them heavily to capture, maintain and use both customer history and order data in their marketing campaigns. The vendor eliminated critical features, leaving The Norris Group in a bind. When the vendor’s platform produced an increasing numbers of bugs, Norris Group managers decided to act. “The e-mail vendor eliminated the very features we needed to effectively market our seminar and loan products,” says Aaron Norris, marketing director for The Norris Group. “That’s when we brought the data in-house and built our own database.”

Things went well at first, but over time their home-grown database began exhibiting errors. These issues eventually culminated in an unrecoverable crash that resulted in customer data loss. That data disaster spurred The Norris Group to find dependable marketing tools within a comprehensive CRM solution.

### SOLUTION

Norris began his search for a CRM tool on the Internet. He read many white papers and quickly narrowed the 50 or so CRM systems down to SugarCRM, Salesforce.com and Microsoft Dynamics CRM. Representatives from the three companies, including Microsoft partner Spinnaker, made their presentations. Norris’ team evaluated them against their two primary requirements of a solution with a low impact on the IT team and easy access for remote users.

“I wanted a hosted solution for two primary reasons,” explains Norris. “I’m basically our IT department so I wanted a solution that would not be a burden on me to implement and maintain. Secondly, I wanted our employees working from home to be able to access and work with CRM data.”

Other requirements included a flexible platform that could easily be configured by non-technical people. The interface also had to be very simple and intuitive to use. “Our customers love our products and services, but we’ve done a poor job in the past of using technologies to capture operational efficiencies,” recalls Norris. “To give you an idea of where we were, we recently implemented e-mail for employees. So we had to set the bar for ease-of-use of a CRM solution very high.”

Based on these criteria, Norris chose Microsoft Dynamics CRM Online. His team makes use of the marketing and sales modules. “I love the interface,” says Norris. “It works very well with Office Outlook and we integrated it to collect data from our Web site.”





Then, as customers interact with the company across different touch points, that activity is tracked and logged. "That helps make Microsoft [Dynamics] CRM [Online] our information hub," says Norris. "We get a full view of our customers' activities and preferences, which leads us to creating more sophisticated marketing campaigns."

The new tool utilizes automated follow-up features to increase visibility and communication between the company's departments to enhance marketing activities. For example, employees use the marketing module to create targeted marketing lists to advertise an upcoming seminar. Then they craft a campaign that uses direct mail and e-mail channels to contact prospects at appropriate dates before the seminar.

#### **BENEFITS**

Microsoft Dynamics CRM Online delivered the reliable platform Norris needed to protect, analyze and share customer data with employees. His team can now use that data to sell and up-sell his firm's products and services much more effectively.

- Business intelligence slashes direct mail costs—The company used to send direct mail to 40,000 prospects. Managers used the marketing module to weed out 30,000 low-potential contacts and save the company thousands of dollars in direct mail costs.
- Interdepartmental customer visibility improves up-sell opportunities—Previously, employees in the loan and seminar departments were not aware of customer activity in the other departments.

The new solution allows marketers to scrutinize customer activities and use that information to optimize cross-sell opportunities. For example, customers who complete training seminars make excellent prospects for the firm's loan products.

- Automation features significantly boost productivity—The company's Web site generates 250 new prospects per month. It used to take 62 hours to input that data, but now employees can complete that in seven. After getting prospects into the system, employees used to write individual e-mails to follow up with people using a manual system. To replace that inefficient process, Norris used the solution's features to create standardized e-mails and letters and automate their distribution at different touch-points in the sales cycle. It used to take many minutes per e-mail versus the seconds it takes now.
- Centralized customer data repository protects corporate assets—Before the CRM solution, when salespeople left the company, they took their client data with them. Microsoft Dynamics CRM Online ensures that hard-won customer data stays with the company and is accessible when employees leave, are on vacation or are out sick.
- Hosted solution eases administrative burden—By choosing the hosted solution, Microsoft takes on the IT burden of updating and administering the solution. Moreover, the company's vital customer data is backed up by enterprise-class Microsoft infrastructure and processes.

**"Microsoft [Dynamics] CRM [Online] is essential for us to achieve our long-term goal of effective marketing and sales touches with our customers."** Aaron Norris, Marketing Director, The Norris Group

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