



Microsoft Dynamics Customer Solution Case Study



Customer: Devine Capital
Web Site: www.devinecapital.com
Customer Size: 4
Country or Region: United States
Industry: Executive placement
Partner: Workopia

Customer Profile

Based in Redwood City, California, Devine Capital Partners is an executive search firm serving public technology companies and private equity backed ventures.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM
- Microsoft Office
 - Microsoft Office Professional Edition 2003
- Microsoft Server Product Portfolio
 - Microsoft Exchange Server® 2003
 - Microsoft SQL Server® 2005
- Windows Server® 2003 Standard Edition
- Windows® XP Professional

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Executive Search Firm Implements New CRM System, Improves Productivity by 25 Percent

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Cindy Combs, Partner, Devine Capital

For Devine Capital, the executive-level candidates with whom employees interact have high expectations. In turn, this drives the need to capture and use very detailed information about the candidates. Devine Capital had relied on Microsoft® Office Outlook® and the Encore contact management tool to meet this need. However, the Encore interface was rigid and did not integrate effectively with Outlook. After implementing Microsoft Dynamics™ CRM 4.0, time spent on daily administrative tasks was reduced by 25 percent.

Business Needs

Competition among Fortune 500 high-tech companies is fierce. So when some of the most well-known firms in the world need top talent, they seek a specialist to help. That's the mission of Redwood City, California-based executive search firm Devine Capital Partners. Its small cadre of employees establishes, maintains, and nurtures relationships with top employees of Fortune 500, venture capital, and private equity firms. From CEOs to Board of Director

placements, the company's business model relies on a low-volume, high personal-touch philosophy.

“We have a narrow breadth of business that runs a mile deep,” says Cindy Combs, Partner for Devine Capital. “To capture and retain household-name industry clients requires that we maintain very detailed database information on our clients and candidates.”



Unfortunately, the firm's legacy Encore contact management system led to a lot of manual duplication of effort. For example, it didn't interoperate with the Microsoft® Office Outlook® messaging and collaboration client, and employees had to manually copy and paste e-mail message details and calendar data into Encore. If a client changed an appointment date—a frequent occurrence—workers would have to update it manually in Encore as well.

"In order to maintain the high level of service we expect of ourselves as our company got bigger, we knew we had to introduce a CRM system that would eliminate a lot of the administrative work we spent our day managing," recalls Combs.

Solution

The firm's research led managers to consider Salesforce.com and Microsoft Dynamics™ CRM 4.0. After seeing demonstrations and analyzing the solutions, managers selected Microsoft Dynamics CRM.

"The biggest thing Microsoft Dynamics [CRM 4.0] had going for it was that it integrated with Outlook," explains Combs. "That eliminated the manual duplication of effort we used to have to do to cut and paste notes between applications as well as update calendars in two places. The familiar Microsoft interface also makes the solution very easy to use."

Combs adds that the application's mobility features are important for a staff that spends a lot of time on the road. They need access to customer data to fulfill networking and business development goals.

Another major factor in the decision to invest in Microsoft Dynamics CRM 4.0 was the fact that "the solution is backed by a stable

company that will continue to develop it," says Combs.

The firm engaged Microsoft Partner Workopia to help with the implementation. "The Workopia team understands how we use customer and candidate data," explains Combs. "They're meticulous in their attention to detail. They turned off some fields we don't use, added others, and changed the nomenclature of fields to match what we use at our company."

Now, employees use Microsoft Dynamics CRM 4.0 to manage executive searches. They capture data about target companies and contacts, along with information about potential candidates. Then they use the search and tag features to create target lists of candidates. The next step is to call people to discuss specific positions and create notes detailing the results of those discussions.

Once the candidates have been vetted, employees assemble a presentation book that includes the applicants' biographies and pictures. The new solution will provide a single repository of biographical data that will be kept up-to-date so that presentation books can be put together very quickly.

Benefits

Microsoft Dynamics CRM 4.0 replaced a manually-intensive process with one efficient system that reduced the time spent on daily administrative tasks by 25 percent.

Enhanced Interactions with Clients and Search Candidates

- Search consultants can more effectively track and manage their candidate pipelines.

- Colleagues can log the results of interactions with search candidates to help prevent calling the same candidate twice about the same opportunity.
- Any employee can review the contact notes to pick up where a coworker left off on a project.
- The capture of detailed notes, such as whether a candidate is willing to relocate, demonstrates that employees "listen" to individual needs, which in turn helps earn the respect of CXO-level candidates.

Reduced Administrative Burden, Improved Productivity

- Now, employees find it easier to conduct searches and tag relevant candidate records.
- To eliminate the manual entry of communication content and date/time stamps, managers have configured the solution to automatically attach e-mail communications to contacts.
- Integration with Office Outlook automatically tracks calendar changes within Microsoft Dynamics CRM 4.0.
- Managers calculate that by using Microsoft Dynamics CRM 4.0 each employee's administration time has been cut by 40 hours per month.
- Search consultants now maintain up-to-date candidate biographical information that they will use to create presentation books for clients. Managers estimate this will reduce the elapsed time to complete this task from three days to half a day.