



## Microsoft Dynamics Customer Solution Case Study



## Consultant Company Empowers Sales Leadership with Superior Business Processes

### Overview

**Country or Region:** United States

**Industry:** Professional services

### Customer Profile

RightNow Business Development Systems helps companies supporting the real estate industry reach their sales objectives by increasing the effectiveness of sales teams and by developing sales leaders.

### Business Situation

With business growing very quickly, RightNow needed a scalable, flexible sales and account management solution that would allow its team to function at optimal productivity.

### Solution

RightNow implemented Microsoft Dynamics™ CRM 3.0 for all employees, integrating the solution with other Microsoft® products and technologies already in place.

### Benefits

- Promotes productivity
- Follows business requirements
- Delivers results for company and clients
- Supports fast growth

“Microsoft Dynamics CRM 3.0 is nimble and scalable, which gives me confidence that it can meet our evolving business needs for years to come.”

Michael Davis, Director of Sales and Marketing, RightNow Business Development Systems

When RightNow Business Development Systems experienced rapid revenue growth and increasing sales volumes resulting from its successful sales training and process consulting business, it needed a better solution to manage its own sales, marketing, and client relationships. Consultants and managers required a better way to work with larger numbers of clients, consistently track the process of converting leads to sales, and assess the results of sales and marketing campaigns. A trial of a hosted Salesforce.com solution offered RightNow neither the flexibility nor the cost-efficiency it sought. Teaming with Microsoft® Certified Business Solutions Partner Workopia, RightNow implemented Microsoft Dynamics™ CRM 3.0 software with strong results and at the right cost. Today, the company generates more new business than ever before and assists its many clients with outstanding service quality.



“We didn't want to change our business model to match predefined processes of CRM software. Microsoft CRM is very adaptable and offers us this flexibility.”

Michael Davis, Director of Sales and Marketing, RightNow Business Development Systems

## Situation

RightNow Business Development Systems in Walnut Creek, California, helps companies accomplish their business objectives by providing them with proven strategies and effective measurement tools to focus their sales activities, develop critical skills, and grow sales leadership. When RightNow experienced rapid business growth, it quickly realized that its associates needed to have a complete view of client accounts and the ability to share critical information in order to serve all clients with excellence. RightNow lacked a company-wide technology solution to assist in this effort. One associate tested Salesforce.com, a hosted service. However, company managers did not feel that Salesforce.com offered the customizability and affordability they were looking for. Therefore, RightNow researched other available customer relationship management (CRM) solutions.

## Solution

RightNow employees already used Microsoft® Office Outlook® 2003 messaging and collaboration client as their e-mail program and contact manager. It made sense to consider a CRM offering from Microsoft and build on existing software skills. After querying Microsoft, RightNow quickly connected with Workopia, a Microsoft Certified Business Solutions Partner, and decided to implement Microsoft Dynamics™ CRM 3.0 software. Workopia, well understanding the professional needs and financial constraints of small businesses, immediately understood RightNow's customer relationship management goals. Michael Davis, Director of Sales and Marketing at RightNow, says, “Workopia operates at a high level of professionalism and always responds quickly. It also helped that they could work with us in a virtual way, because most of us spend a lot of time on the road.”

After a recent upgrade, RightNow uses Microsoft CRM 3.0 to manage all client accounts and client-directed business activities. Microsoft CRM integrates smoothly with Outlook 2003. Microsoft Windows® Small Business Server 2003 provides an infrastructure for the company's collaborative business processes.

## Benefits

For RightNow, Microsoft CRM 3.0 is an effective business management solution that lets the company grow rapidly, serve its clients well, and pursue a successful business model. Says Frank Lee, President of Workopia, “Microsoft Dynamics CRM 3.0 is a perfect fit for the needs of smaller businesses like RightNow. The solution is so reliable, scalable, and easy to maintain that RightNow can keep a strong focus on its goals and keep closing business.”

### Promotes Productivity

RightNow associates, already familiar with Outlook, found Microsoft CRM very easy to learn and use. That ease-of-use is also critical for the company's newly hired employees. The solution's user interface is comfortable and intuitive. Integration with Outlook means that business contacts and communications can be maintained in Microsoft CRM. Associates manage all client-directed activities efficiently in one application.

### Follows Business Requirements

Says Davis, “We were uncomfortable with the level of customization and cost associated with Salesforce.com. Microsoft CRM fits our business needs much better.” Microsoft CRM allows RightNow to follow its own, well-proven sales process. Davis and his team found it easy to customize the solution to their workflow preferences. “We didn't want to change our business model to match predefined processes of CRM software,” says Davis. “Microsoft CRM is very adaptable and offers us this flexibility.”

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Workopia products and services, call (415) 531-6574 or visit the Web site at:

[www.workopia.com](http://www.workopia.com)

For more information about RightNow Business Development Systems products and services, call (925) 977-3400 or visit the Web site at:

[www.nowstuff.com](http://www.nowstuff.com)

## Delivers Results for Company and Clients

"Microsoft Dynamics CRM gives us the ability to have a true 360-degree view of our clients," says Davis. RightNow associates can review—at a glance—events in the company's accounts and respond immediately to client needs. They also can assess the results of marketing campaigns and act on new business opportunities quickly, thereby ensuring a strong return on the company's marketing spending.

## Supports Fast Growth

Recently, RightNow doubled revenue growth year over year. The company sees better results from its lead-generation programs and increases staff to satisfy client demand. With increased efficiency and better productivity company-wide, Microsoft Dynamics CRM 3.0 both helps accelerate this growth and helps manage it. Says Davis, "Microsoft Dynamics CRM 3.0 is nimble and scalable, which gives me confidence that it can meet our evolving business needs for years to come."

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

## Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM 3.0
- Microsoft Office System
  - Microsoft Office Professional Edition 2003
  - Microsoft Office Outlook 2003

- Microsoft Windows Server System™
  - Microsoft Windows Small Business Server 2003

## Partners

- Workopia

© 2006 Microsoft Corporation. All rights reserved. This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY. Microsoft, Microsoft Dynamics, Microsoft Dynamics logo, Outlook, Windows, and Windows Server System are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are property of their respective owners.

Document published February 2006

**Microsoft®**