# Case Study

## Microsoft Dynamics CRM Online to Drive Up-Sell Opportunities

## Business Challenge

Our client is one of the leading real estate firms in the DC area. The client was using the services of an online e-mail marketing vendor which had the client's customer history and order data. With New anti-spamming restrictions and an unstable system, the vendor was not able to support the client's needs and resulted in costly errors.

To overcome this problem, the client brought the data in-house. The database began exhibiting errors and progressively degraded and finally an unrecoverable crash that resulted in customer data loss. The client wanted to have a new solution which can overcome all the previous shortfalls.

## JIVA's Solution

Since the client wanted a flexible solution where it is easy to configure by non-technical people and have a friendly user interface and provide the users an access to CRM even at home, we suggested Microsoft Dynamics CRM.

Earlier the company used to send direct mail to 40,000 prospects. After deploying the Microsoft Dynamics CRM, Managers now use the marketing module to remove the unnecessary 30,000 low-potential contacts and save the company thousands of dollars in direct mail costs.

In the past, employees in the loan department were not aware of activity of the customer in the other departments. The new solution allows marketers to analyze activities of the customer and use that information to optimize cross-sell opportunities.

## Business Result

Since the solution we offered to the client was Microsoft Dynamics CRM on a hosted server, the company's vital customer data is more secure. Earlier when the salesperson 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, go on vacation, or are out sick. That way centralized customer data repository safeguards corporate assets.