

CRM Case Study: Sourcemia

Client Overview

SourceMedia (SM) is a financial periodical publishing house based in New York City. We have been involved in their CRM deployment over a period of two years. During that time, they have implemented two deployments of Microsoft CRM: one for advertising sales and the other for circulation sales and customer service.

The Situation

In our initial engagement, we were called in to train 60 users. During the training project we discovered that user adoption of the system was not ideal. We identified a number of issues that were causing problems for the users. Our final report from the training engagement detailed a number of adjustments and changes to the existing system to facilitate user adoption and make the project a success. Sourcemia implemented our recommendations and engaged us to assist in completing the advertising sales deployment, as well as provide follow-up training sessions for advertising sales.

In our second engagement, we were brought in to design a custom implementation of Microsoft CRM to replace multiple in-house subscription fulfillment systems and provide a centralized system with access to a number of legacy systems that could be used by the subscription sales and customer service staff. This particular project had a number of unique design challenges due to the fact that SourceMedia did not want any information to be shared between this subscription group and the advertising sales group. We worked in conjunction with SourceMedia project managers and developers on this project to design a highly customized CRM implementation to meet the specific needs of SourceMedia. The project involved linking CRM to three legacy systems via data synchronization and integrated cross-linking to provide end-user transparency. This involved both extensive re-architecture of their fulfillment processes and a significant amount of customization and extending of CRM.

In some cases, it was necessary to connect to legacy systems or data so the customer service representatives had access to historical data from within a single application. Custom applications (web pages) were written to retrieve and display this legacy data from within CRM so the user experience maintained a consistent look and feel and the user was not forced to switch between applications.

This engagement also included end-user training for all users immediately prior to going live.

The Results

This project is a success for a number of reasons. First of all, the entire order fulfillment process was greatly streamlined by the migration to Microsoft Dynamics CRM. The amount of time required to complete an order was reduced by more than 50%. In addition, both subscription sales and customer service personnel are now able to share data on the same platform for the first time, greatly improving the visibility of customer satisfaction issues to both sales and support personnel.