

Grant & Eisenhofer Selects Gold Certified ISS Group as Microsoft® Dynamics Customer Relationship Management Partner of Choice

Grant & Eisenhofer P.A. (G&E) is a national litigation boutique that concentrates on federal securities and corporate governance litigation. G&E exclusively represents institutional investors, both public and private, who have been damaged by corporate fraud, greed and mismanagement. Based in Wilmington, Delaware and New York City, G&E routinely represents clients in federal and state courts throughout the country.

Challenge

G&E was in serious need to re-structure their data into a more useful, user-friendly, and readily available format; allowing Microsoft Dynamics Customer Relationship Management (MSCRM) users to get the views/reports of the data they need. They also needed to import 'raw' Standard & Poor (S&P) data from multiple and disparate S&P sources, and retrieve contact information from disparate sources, such as Exchange, based on a configurable rules-based workflow; share contacts and related information with other users.

Solution

ISS Group has built an import tool to load Standard & Poor data into CRM which created new relationships between this data to facilitate their research efforts. An integration and approval process between Microsoft Outlook Contacts and CRM Contacts was created to help provide G&E better control and the ability to share User's Outlook contacts. *"Our user base is very skilled at what they do, but they're not computer savvy,"* recalls Will Cash, Director of Information Systems. *"We needed a solution that was very easy to use and could work well with [Microsoft Office] Outlook—an application they use all day."*

- ❖ **Re-implementation of existing Microsoft Dynamics CRM 3.0 Solution**
- ❖ **Custom develop an import tool through the use of the xRM platform, to retrieve – on a quarterly basis – raw S&P data from multiple S&P sources and post into CRM**
- ❖ **Another use of the xRM platform was to custom develop a user-configurable, rules-based tool to retrieve contact information from disparate systems, such as Exchange, which maps this information to a staging entity prior to posting into MSCRM**

What is xRM?

xRM is a Microsoft® application platform layer that underpins Microsoft Dynamics® CRM. It accelerates the development of relational line-of-business applications through point-and-click configurations or customizations. The platform is built upon integration-friendly Microsoft technologies, such as Windows Server®, Microsoft SQL Server®, and the Microsoft .NET Framework. The platform's flexibility ventures beyond traditional CRM usage, giving rise to the term xRM.

xRM platform delivers business benefits to IT. *"The reason I get so excited about xRM is that I now have a system that can create applications that allow us to run our business the way we want to and in a way that promotes user satisfaction,"* states Cash.

Efficient integration with the firm's Microsoft application stack enhances the business value of all systems. Because xRM takes advantage of familiar Microsoft technology as building blocks, users can easily access a data repository constantly updated with the latest data. Moreover, customer data is entered once for use across systems, so employees no longer need to copy and paste data between applications, thus streamlining customer communications across all channels.

Benefits

- ❖ **Data is now structured in a more normalized fashion allowing the user to easily and readily access pertinent information in user-defined dashboards and reports**
- ❖ **The custom developed import tool extracts the S&P data and distributes it into CRM entities and builds relationships not readily available in the raw S&P data. By merging data from multiple S&P sources, G&E can provide a global view of the data, obtaining a substantial competitive advantage of G&E**
- ❖ **Using the new custom contact mapping function, contacts can then be reviewed, and based on G&E's rules-workflow, will get migrated into the standard MSCRM contacts entity with user-customizable mapping. The contacts can then be synchronized with other user's Exchange contacts. G&E has control over the users that will receive the contacts and the mapping to the Exchange contacts is user-customizable**