



Microsoft Dynamics Customer Solution Case Study



CREDENTIALCHECK®

Customer: Credential Check Corporation

Web Site: www.credentialcheck.com

Customer Size: 30 employees

Country or Region: United States

Industry: Human Resources

Partner: Atrio Systems

Customer Profile

Based in Troy, Michigan, Credential Check Corporation provides applicant screening services to corporations around the world.

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics CRM 4.0
- Microsoft Office
 - Microsoft Office Professional 2007
 - Microsoft Office Professional Edition 2003
- Microsoft Server Product Portfolio
 - Microsoft Exchange Server 2003
 - Microsoft SQL Server® 2005
- Windows Server® 2003 R2
- Windows Vista®
- Windows® XP Professional

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Employment Screening Company Optimizes Productivity, Improves Customer Satisfaction

“The Microsoft [Dynamics CRM] solution is active at every touch point we have with people, from the time they become an opportunity, to the time they become our client, and beyond.”

Michael Pachuta, President of Credential Check Corporation

When employers need to be sure about the backgrounds of people they hire, they call Credential Check Corporation. To do this work, the company utilized Microsoft® Office Outlook® and proprietary access programs, which made it difficult for departments and external suppliers to collaborate with each other. These challenges motivated executives to evaluate CRM solutions and select Microsoft Dynamics™ CRM.

Business Needs

Credential Check Corporation provides applicant screening services to corporations around the world. The company verifies information provided by applicants by contacting previous employers and educational institutions and by having their over 2,500 courthouse investigators pull records from courthouses throughout the country. In addition Credential Check accesses tens of millions of records via databases, indexes, and State Repositories to corroborate the accuracy of the credentials that applicants submit and to collect additional relevant data.

The firm's legacy process was manually intensive, drawing upon time-consuming tools to capture and store the resulting data. Consequently, it was an inefficient way for teams to collaborate on investigations. Moreover, managers found it difficult to access information stored in data silos to create useful reports.

Due to the highly sensitive nature of the background screening profession, Credential Check was adamant about establishing a technology solution that would provide audit trails of investigations and client interactions.



Solution

The CRM solution review team completed a series of hands-on trials and combined that experience with extensive research on various alternatives. That process winnowed the choices to Salesforce.com, GoldMine, and Microsoft Dynamics™ CRM business software. Managers then compared the three solutions.

One of the major requirements was ease of use. Managers wanted an application that employees and external partners could quickly learn, adopt, and use. Second, the solution had to integrate well with other corporate systems. The list included Microsoft® products like Microsoft Office SharePoint® Server and the firm's Microsoft Dynamics GP accounting software.

Based on these criteria, the team made its decision. "Our extensive evaluation led us to choose Microsoft Dynamics CRM," recalls Jessica Proszek, Information Management Coordinator for Credential Check Corporation.

Working with Microsoft Partner Atrio Systems, executives rolled out Microsoft Dynamics CRM to employees in multiple departments, including business development, human resources, information management, and accounting, and to the executive management team. They also allowed affiliate business owners to use the software to create and submit proposals to prospects.

Company managers liked what they saw in the latest release of the product and have recently upgraded to it. "We definitely liked the multi-lingual, multi-currency, and multi-tenancy features," explains Proszek. "We felt that gave us the option to expand the platform to serve international markets—something that definitely supports our business model."

Employees will use the marketing module to devise and implement campaigns before trade shows. Then they'll use the application to track leads and tie them to outcomes. Additionally, the company's newsletter team plans to create and maintain a targeted distribution list.

Currently, employees use the sales module to collect and track applicant data along with information about customer interactions. Business Development Managers use Microsoft Dynamics CRM to manage their lead pipeline. Managers have established workflows to nudge prospects through the process and to enhance the effectiveness of business development activities.

Managers plan to use the dashboard feature available in the latest version to stay current on employee performance metrics. "If you can't measure it, you can't manage it," says Michael Pachuta, President of Credential Check Corporation.

By integrating the solution with Microsoft Office SharePoint Server, executives have established a single repository of customer and account information. "The Microsoft [Dynamics CRM] solution is active at every touch point we have with people, from the time they become an opportunity, to the time they become our client, and beyond," explains Pachuta. "We use the CRM platform with SharePoint to host relevant documents such as contracts, to send a new client a welcome packet, and to automatically trigger events like a follow-up call from our client service team."

Benefits

Microsoft Dynamics CRM delivers the usability, workflows, and flexibility to enhance the company's ability to capture and keep business.

Boosted Productivity

- Managers like the ability to establish rules to track e-mails automatically.
- The ability to check for duplicates maintains the integrity of data while eliminating wasteful double entries.
- Managers plan to capitalize on the dashboard tool in Microsoft Dynamics CRM to focus on key metrics and processes to enhance employee performance.

Reduced Costs, Empowered Employees

- The easy-to-use report wizard has eliminated the need for programmers to create customized many-to-many relationship reports. Now employees can organize data themselves to analyze trends and implement new strategies and tactics.
- Workers can easily create and use workflows to automate administrative work and to ensure that steps are not forgotten. Managers plan to create standard workflows for major processes and then encourage employees to customize them.

Support for Business Expansion

- With support for multiple languages, multiple currencies, and multiple time zones in Microsoft Dynamics CRM 4.0, the company's CRM system can grow with the company as it expands internationally.

Flexible, Easy-to-Integrate Solution

- Because Microsoft Dynamics CRM 4.0 easily integrates with the firm's Office SharePoint Server and Microsoft Dynamics GP systems, managers have a comprehensive CRM tool to facilitate effective collaboration among employees and external partners.
- Managers now can access and review real-time data to create usable business intelligence.