



Microsoft Dynamics Customer Solution Case Study

RYCOM Inc. Simplifies Customer Information Management with Microsoft Dynamics Technology

Overview

Country: Canada

Industry: Technology Services

Customer Profile

RYCOM Inc. is a Canadian provider of payment processing solutions, authentication and security solutions as well as a managed IT services provider.

Business Situation

Managing a portfolio of diverse and fast growing lines of business made managing customer information a challenge for the company.

Solution

Working with Microsoft Gold Certified Partner Tectura, the company implemented a Microsoft Dynamics GP and Microsoft Dynamics CRM solution.

Benefits

- Time savings
- Improved customer information tracking
- Improved efficiency

“Customers today know they have a choice when it comes to service providers and they expect the vendors they work with to fully understand their business and their requirements. Microsoft Dynamics CRM helps us meet and exceed these expectations on an ongoing basis.”

Pat Mancuso, Vice President Business Operations & Finance, RYCOM Inc.

Operating since 1997, RYCOM Inc. is a Canadian provider of payment processing solutions, authentication and security solutions as well as a managed IT services provider. Handling a portfolio of diverse and fast growing lines of business made managing business process information and customer information a challenge for the company. Working with Microsoft Gold Certified Partner Tectura, the company implemented a Microsoft Dynamics™ GP and Microsoft Dynamics™ CRM solution. The solution helped RYCOM realize significant time savings, consistently deliver excellent customer service, and more strategically plan for future growth.



Situation

Operating since 1997, RYCOM Inc. is a Canadian provider of payment processing solutions, authentication and security solutions, as well as a managed IT services provider. The company has a much longer history, however, having operated as a networking division of Motorola for 37 years.

The company has become one of the leading technology service providers in Canada. RYCOM's point of sale payment transactions service processes over 2 billion transactions each year. Its security solutions safeguard critical information from security threats for some of Canada's premiere organizations.

The company worked with the Canadian Government and technology vendors to first develop the CanPass Air and Nexus Air—an innovative border security solution for frequent travelers. RYCOM's authentication solutions process Canadian and American frequent travelers at airports throughout Canada using the latest in iris recognition biometric identification. It is the technology company behind Nexus Air and the countless hours this service saves business travelers each year.

The newest part of its business is a national service called RYCOM Telecom Property Management which provides a range of telecom and IT in-building services to telephone companies, tenants and landlords. The company works with Cadillac Fairview Corporation Limited and Oxford Properties Group, managing over 100 of their commercial buildings across Canada.

Managing such varied and fast growing lines of business can at times be challenging, particularly as the company strives to provide customers across its service portfolio with the same level of outstanding customer service. A user of Microsoft Dynamics GP since 1998, the company found the software helped it

maintain business process and reporting discipline thereby allowing the organization to achieve clarity in day to day transactions and long term planning. As the organization grew, however, it wanted to access the wider range of tools and capabilities in the newest iteration of the Microsoft Dynamics GP product.

RYCOM also felt it required a more formal customer information management solution to maintain its high level of customer service as the company continued to grow.

Its telecom property management business unit, for example, requires the technician dispatched to answer a support call be closely acquainted with the property's previous issues, the logistical information for the location, as well as any technical requirements. RYCOM also works with outside contractors to solve some of its customers' challenges and wanted to streamline procedures such as access and security control for the technicians it hires.

The company had been tracking this information manually, but felt that the amount of time required to create accurate documentation was too great in relation to the pace of its business. Manual tracking also introduced the potential for errors; something the company was unwilling to risk.

"We needed a customer service tracking system for the payments side of our business," says Pat Mancuso, Vice President Business Operations & Finance, RYCOM. "We manage a network that processes billions of transactions a year, so we needed a way to track support calls coming in, work tickets, and escalation requests. Our other lines of business were also growing their services components and issuing thousands of work tickets each month, making it imperative for us to have a way to document service history for each of our clients. We felt an IT solution

would help us manage this information in a much more efficient way.”

As RYCOM’s business grew the company also wanted to gain a way to track sales leads and other business growth opportunities.

Solution

RYCOM embarked on a search for a customer relationship management (CRM) solution in late 2005. The company evaluated a few CRM products on the market, but decided Microsoft Dynamics CRM was the best fit for its organization. Seeing an opportunity to refresh its infrastructure, RYCOM also decided to upgrade its Microsoft Dynamics GP solution at the same time. Working with Microsoft® Gold Certified Partner Tectura Corp., RYCOM implemented the solution in February, 2007.

With Microsoft Dynamics GP, RYCOM has access to powerful business management software designed to empower its staff to be their most productive and make an impact on the organization. The solution’s look and feel, which is much like Microsoft® Office® System productivity tools, makes the technology intuitive to use for both pros and first time users.

The solution also helps manage the company’s many lines of business. Microsoft Dynamics GP provides the organization with the ability to drill down into any aspect of the business, understand what factors truly determine performance and results, and conduct strategic planning based on substantiation through its business information.

Sales margins are crucial for any business. By leveraging Microsoft Dynamics GP, RYCOM is able to analyze its tenant sales information and can quickly view monthly sales margins and thereby quickly adjust their customer quotes as necessary to meet targets, develop cost and sales analysis and liaise with third party vendors to set competitive pricing rates.

In addition, RYCOM can easily access the advanced reporting functions of Microsoft® SQL Server 2005, analyze and report on data in Microsoft® Office® Excel® spreadsheet software, and use all of its other preferred reporting tools. The solution helps ensure that business managers have access to any information they need, through customized screens and reporting tools. It also helps employees remain focused on critical activities without having to stream through pages of information, simplify collaboration on team tasks in areas ranging from financial management, supply chain, , project accounting or business analytics.

Customized workspaces allow staff to develop their own screen views in order to quickly access only the information that is most relevant to them specifically: what sales were in a particular region; which sales people had the highest sales; and revenues and margins for any given sales region. All of this information can then be shared easily and in real-time with teams and regional managers in a few clicks.

With Microsoft Dynamics CRM, RYCOM has access to a customer relationship management solution that provides tools and capabilities needed to create and easily maintain a clear picture of its customers, from first contact through to purchase and post-sales.

“From the outset of our search for a CRM solution we thought a Microsoft solution would likely be the best fit because of our excellent experience with Microsoft Dynamics GP,” says Mancuso. “We have been using that system for nearly a decade and it has truly transformed our business. It has helped us to streamline our invoicing, inventory management, accounts payable and receivables as well as helping make monthly and year end reporting a breeze. In the entire time we have been using Microsoft Dynamics GP we have never considered switching to a different solution.”

As its business continues to grow, RYCOM can feel secure in the knowledge that the flexible, fast and cost effective Microsoft Dynamics CRM solution will be able to adapt to its changing needs. Most importantly for RYCOM, the solution is designed to deliver consistent performance as its business grows, supporting measurable improvements in every business process, enabling closer relationships with customers and helping it to achieve new levels of profitability.

Microsoft Dynamics CRM enables staff to obtain quick and easy access to customer data through context-sensitive information for populating forms or taking next steps without changing screens. Its customized workspaces allow users to create, save, and reuse favorite views of customer data without the distraction of unneeded information. Additionally, the solution's Service Calendar allows service schedulers and dispatchers to schedule activities by resource, time, or service.

"Before we had Microsoft Dynamics CRM our scheduling was all done manually and it was time-consuming and inefficient," explains Mancuso. "Today, we don't have to scroll through our calendars, emails, or go from memory for our customer appointments – it's all available in real-time and in one centralized location."

The solution also provides RYCOM with the powerful reporting and analysis tools the company was seeking, making it easier for managers to identify opportunities and problems at a glance.

Benefits

Implementing a new version of Microsoft Dynamics GP and Microsoft Dynamics CRM has helped RYCOM realize significant time savings in the area of reporting and customer information tracking. Staff no longer has to spend hours populating spreadsheets and

gather pieces of disparate information, as all information is updated on a real-time basis and is all stored online for easy access from any office. The solution helps the company consistently deliver the excellent customer service its customers have grown to expect.

"We no longer keep paper records and have to worry about losing intellectual property when employees leave and potentially take all of that knowledge in the paper-based notebooks," explains Mancuso. "Our customers can rest assured that we can assist them with any request even if their main point of contact is on vacation – everything is up-to-date and stored online."

It also helps the company gain invaluable business intelligence, enabling RYCOM to more strategically plan for future growth with quick and easy access to sales and margin analysis reports.

Enabling Business Growth

The easy to use Microsoft Dynamics GP is helping RYCOM keep close watch on its growing business, ensuring all processes are carried out at optimum efficiency. The rich reporting features of the solution allow the organization to easily create reports that provide a range of data views—from the most top level trends, to deep granular performance snapshots. Microsoft Dynamics GP is also helping RYCOM reduce training costs as the company finds staff typically needs minimal time to get familiar with the solution.

"My staff finds the technology easy to use and very powerful. Reports are a snap to generate; end of month and end of year is a breeze. Microsoft Dynamics GP meets and exceeds our business requirements and allows us to really track our financials and business data analysis. All in all, it's a very good system," says Mancuso.

“As our client base grows we are finding ourselves in the fortunate situation of not having to hire staff just to manage increased administrative workloads. We are now able to approach growth more strategically—automating many administrative tasks through the CRM tool and allowing staff to focus on their core competencies,” he adds.

Long term business planning is also made easier for RYCOM with the help of Microsoft Dynamics GP. Transaction information captured within the system can be easily accessed by company managers and provides the organization with historical data and trend information that makes forecasting a simpler and more accurate process.

Know Your Customer

A growing client base and services business is no longer a challenge for RYCOM to manage. Microsoft Dynamics CRM helps the company to gather customer information on an ongoing basis which can then be re-used by the entire organization. This is not only reducing the amount of time spent on documenting day to day activities and customer requests, but is also providing the company with a holistic view of its customers, helping it provide better service to clients.

“Previously, most of our customer information lived on scraps of paper, or in someone’s head, now it is captured within a single application. This enables us to facilitate information sharing throughout the company and helps us ensure a technician answering a service call arrives at the customer site with a full understanding of the customer’s needs,” says Mancuso. “Customers today know they have a choice when it comes to service providers and they expect the vendors they work with to fully understand their business and their requirements. Microsoft Dynamics CRM helps us meet and exceed these expectations on an ongoing basis.”

RYCOM is finding this a particularly significant benefit in its payments line of business. It works with a few quite large customers in this side of its operations, which necessitates the capture of large volumes of information. With Microsoft Dynamics CRM, this information can now be easily captured and later accessed as needed.

By allowing the company to automate many administrative tasks associated with customer service, RYCOM is also finding Microsoft Dynamics CRM an ally in its business expansion strategy.

Looking to the Future

With the CRM solution in place for only a short period of time, RYCOM continues to find new ways of using the information captured by the system, and is already considering further expanding how it leverages the system.

“Our staff is still discovering the potential this solution provides to make their jobs easier,” says Mancuso. “We are now planning an implementation of Microsoft® Exchange Server, so that we can integrate the CRM solution with Microsoft Office® Outlook® messaging and collaboration client, which we know will help us provide even more value to our staff.”

The company is also looking forward to leveraging the mobile workforce support features of the system and exploring the possibility of integrating its Microsoft Dynamics GP system with its CRM solution.

“Microsoft Dynamics GP is the heart of our business processes and stores a lot of valuable information. The potential we see for benefits realized through joining the two solutions is just too exciting to pass up,” says Mancuso.

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

For more information about Tectura Corporation products and services, call 1-866-278-6662 or visit the Web site at: www.tectura.com

For more information about RYCOM Inc. products and services, call 1-877-TO-RYCOM or visit the Web site at: www.rycom.ca

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.ca/dynamics

© 2007 Microsoft Corporation. All rights reserved. This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY. Microsoft, Example: Active Directory, Windows, the Windows logo, Windows Server, and Windows Server System are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

Document published September, 2007

Software and Services

- Microsoft Dynamics CRM
- Microsoft Dynamics GP
- Outlook 2003
- Excel 2003
- SQL Server 2005

Partner

- Tectura

Microsoft