

Customer Dynamics

"The conversion support available from Customer Dynamics was the crux of electing to go with them. Support was a big deal in our mind - and they took care of us."

Kyle Young, Director of Operations



SIRE Technologies, Inc.

Move to Microsoft Dynamics CRM Makes Good Business Sense for SIRE Technologies.

SIRE Technologies decides to migrate to new CRM platform for its existing in-house expertise in Microsoft technologies, and for the support Customer Dynamics would provide.

SIRE Technologies is a leader in automated document and agenda management solutions tailored for government. Founded in 1985, its focus on the unique requirements of local, county and state governments sets it apart from other document management system providers. It was one of the first to identify agenda management as a critical, underserved need, and has grown that business from its launch in 2001 to be the market leader.

The company serves a variety of governments all across the United States, and has begun to significantly grow its business in Canada. In addition to offering well-focused solutions designed for out-of-the-box performance, SIRE Technologies prides itself on the quality of customer service it provides – doing whatever it takes to deliver solutions that effectively streamline government workflows.

At a Glance

Company

SIRE Technologies, Inc.
2211 West 2300 South
West Valley City, UT 84119

Website

www.siretechnologies.com

Number of Employees

60+

Products and Services

Document and agenda management systems.

Target Market

Local, county, and state governments.

Applications Used

Microsoft Dynamics CRM



SIRE Technologies recently decided to replace a leading CRM system it had used for years, electing to implement Microsoft Dynamics CRM. The value proposition and the support available from Customer Dynamics were compelling reasons for change.

As a Microsoft Gold Certified Partner, SIRE Technologies is well versed in the tools and technologies of Microsoft's development environment. The West Valley, UT-based company provides an array of solutions based on Microsoft technologies for local and state governments. It has made a name for itself in document and agenda management systems, minutes automation, electronic plan submissions, video broadcasting – and more. It had been using salesforce.com, but was looking for a solution that was more aligned with the company's expertise with Microsoft technology, and because it wanted a solution that was easier to extend.

"Microsoft Dynamics CRM has the same technology underpinning as our solutions," says Kyle Young, director of operations. "There was a comfort level with the Microsoft solution right out of the gate. We felt confident in having the skills to write extensions uniquely tailored to our requirements."

Another critical factor was extending access to everyone who needed CRM in performing their jobs. The existing site license was expensive, limiting the number of user seats the company could afford. It forced users to share access, limiting ROI and constraining customer relationship management. Being a Microsoft Gold Certified Partner earned the company a significant discount in licensing Microsoft Dynamics CRM.

The big issue in making the switch came down to data conversion. Data conversion always presents challenges. "It is part of what we do for our customers. But we'd been talking with Customer Dynamics for some time, and their specific expertise with Microsoft Dynamics CRM was compelling," Young says. "The conversion support available from Customer Dynamics was the crux of electing to go with them. Support was a big deal in our mind - and they took care of us."

Customer Dynamics has extensive experience in migrating data from salesforce.com into Microsoft Dynamics CRM. It started with mapping the data in the existing system to fields in the Microsoft system.

SIRE Technologies had eight years of accounts, contacts, histories, notes, and opportunities data – all associated with some 5,500 accounts and more than 6,000 contacts. After making the switch, SIRE Technologies did encounter some discrepancies during the test phase. Some of the discrepancies were due to customizations SIRE Technologies had engineered in its existing CRM system to better match its unique requirements. In some instances it was due to the original CRM package masking various critical elements. Customer Dynamics was able to detect all issues and engineered resolutions in the background while the system was running, avoiding further disruption and degradation of performance.

"The key thing with Customer Dynamics is their willingness to work with us beyond what the contract called for," Young says. "They sat down with us to find the right answer. They demonstrated genuine interest in making the project a success."

SIRE Technologies is greatly anticipating the added value of having its new CRM system integrated with Microsoft Outlook. "There was a big disconnect before," Young explains. "A customer would call in with an issue. We'd have to copy-and-paste into Microsoft Team Foundation to get a fix. And then copy-and-paste again to notify the customer. Integration streamlines that and ensures things don't fall through the cracks."

Throughout the conversion, the solid working relationship between SIRE Technologies and the Customer Dynamics' team was central. "It didn't matter what the source of the issue was. They weren't out just to make a buck." Customer Dynamics' attitude mirrored that of SIRE Technologies in working with its own customers: you do what it takes to make the project a success. Having that kind of relationship with Customer Dynamics, Young says, is what made the challenging process of conversion go smoothly – and quickly.



Customer Dynamics
P.O. Box 271489
Salt Lake City, UT 84127
(801) 428-1200
www.customerdynamics.com