



## Microsoft Dynamics Customer Solution Case Study



### Consultancy Integrates Business Management Technology and Boosts Government Sales

#### Overview

Country or Region: United States  
Industry: Professional Services

#### Customer Profile

immixGroup is a business consultancy that helps clients sell technology to the government. Located in McLean, Virginia, immixGroup has 53 employees and U.S.\$100 million in annual sales.

#### Business Situation

immixGroup grew to \$100 million in sales very quickly. The continued rapid growth might outrun the capabilities of the company's sales and ordering processes.

#### Solution

immixGroup integrated Microsoft® CRM with Microsoft Business Solutions–Great Plains® to speed up the sales and order processing and give executives and customers more visibility into operations.

#### Benefits

- Reduces time needed to prepare complex sales quotes and process sales orders by 50 percent
- Promotes more effective customer service
- Helps eliminate data entry errors
- Supports company in managing fast growth cost-effectively

“[The] new... system allows our sales account managers to create a complex sales quote and process an order for a customer in less than 30 minutes ... half the time needed under the previous system.”

Bill Bottoms, Senior Director, Corporate Operations, immixGroup

From helping customers determine channel and contract vehicle strategies to negotiating government contracts, immixGroup helps clients do business with the federal government. The company's rapid growth, to U.S.\$100 million in annual sales in 8 years, was outpacing its ability to cost effectively manage company operations. immixGroup needed to integrate its sales process with its accounting system. Two Microsoft® partners implemented a scalable solution that integrates Microsoft Business Solutions–Great Plains®, Microsoft CRM, (both now part of Microsoft Dynamics™) and software created with Microsoft Visual Basic® .NET 2003. Now employees can develop a complex sales quote, process the sales order in 30 minutes, and transfer information to the company's financial systems in a few keystrokes. immixGroup executives have greater visibility and control over operations, and it is poised to continue its 35 percent annual growth rate.



“We can now increase our service levels for customers and increase our accountability to them.”

Bill Bottoms, Senior Director, Corporate Operations, immixGroup

## Situation

As a government business consulting firm and technology reseller, immixGroup helps clients in the commercial technology industry sell products and services to their customers in the public sector. immixGroup negotiates government contracts, advises clients on channel strategies, and helps make technology products and services available through a variety of procurement catalogs and supply schedules. The company was started in 1997 and has recently grown 35 percent to 40 percent in each of the last few years.

The company currently books about U.S.\$100 million in annual sales of hardware, software and integration services to government agencies from about 125 technology companies, including IBM, Juniper Networks, FileNet, Network Appliance, SAP, and Unisys. Located in McLean, Virginia, immixGroup has over 50 employees.

Many immixGroup clients offer technology products with multiple-line items or products or services that must be bundled with other hardware or software. It can take anywhere from one to three months to get a technology product or service listed in the appropriate General Services Administration (GSA) schedule, to establish the right price, and to get the product listed in the right database to make it possible for government customers to order a product electronically. Even so, immixGroup succeeded in growing very quickly. “We write a thousand complex quotes a month,” estimates Bill Bottoms, Senior Director of Corporate Operations for immixGroup.

### Outgrowing the Business Management Infrastructure

The fast growth of immixGroup soon strained the capabilities of its technology infrastructure. The company’s original management systems for tracking customer activity and creating sales quotations and sales orders involved too many repetitive, manual steps, and failed to

create a clear picture of overall activity. Customer data resided in five different ACT! databases, which meant immixGroup executives didn’t have a consolidated view of their contacts or their accounts. Similarly, the company’s original method of creating sales quotes was a set of interlinked Microsoft® Office Excel® 2003 spreadsheets and macros to support them. Each quote was stored in multiple locations, with the possibility of potentially multiple versions of every quotation.

In addition, immixGroup used Microsoft Business Solutions–Great Plains® software to track clients’ products. However, the pricing and cost information came from another database outside of Microsoft Great Plains. Because of the complex process of having pricing approved by the government, the pricing in the cost database was not always the same as the information in Microsoft Great Plains, and a manual effort was required to reconcile the two before the order could be placed. Order processors had to manually re-enter all customer and product information from a sales quote into Microsoft Great Plains at the time an order was placed.

### Difficulties Managing Accounts and Doing Business

With multiple versions of customer quotes, and multiple, overlapping databases of customer contact information, it was difficult to create accurate records of customer activity and arduous to prepare internal sales forecasts. An error in a single keystroke could prevent an order from being properly linked to the right customer.

## Solution

Already, immixGroup was using Microsoft Great Plains for its accounting and decided to switch its customer relationship management (CRM) software from ACT! to Microsoft CRM and integrate these powerful enterprise resource planning (ERP) and CRM solutions.

“This means salespeople spend far less time getting product information and more time talking to customers to determine their needs.”

Bill Bottoms, Senior Director, Corporate Operations, immixGroup

Bottoms arranged for Management Information Consulting (MIC), a Microsoft Certified Solution Provider, to work with a team of consultants from ePartners to develop a custom quoting application, install and customize Microsoft CRM, and integrate it with Microsoft Great Plains. The MIC team, led by Anuj Singh of ePartners, was charged with developing a customized quote and order processing application to take advantage of the seamless integration possible with Microsoft CRM. Starting in October 2004, the MIC team took about four months, using the Microsoft Visual Basic® .NET 2003 development system, to create the new sales quote application for immixGroup, a solution they called i-Quote.

With the integrated solution, a sales representative creates a new opportunity for a particular sales contact, launches i-Quote by a single key stroke, and enters the same customer information that used to go into spreadsheets. The i-Quote application uses a third-party tool, Scribe Insight from Scribe Software, to automatically collect up-to-date product information from the inventory records maintained in Microsoft Great Plains. The new integrated system runs on the Microsoft Windows® 2000 Server operating system and is supported by Microsoft SQL Server™ 2000 databases.

Once the quote form has been filled out, another single click links the quote to the customer record in the Microsoft CRM system. It is possible to mail the quote electronically, but most immixGroup customers prefer a printed confirmation form.

When the customer sends a purchase order, the quote can be automatically entered into the Microsoft Great Plains software as an order, where it can be tracked throughout its life cycle, from order entry to final invoicing and payment receipt.

The process works the other way, as well. If a member of the accounting team creates or modifies an order, those changes can be automatically linked by the customized application back to the customer record through Microsoft CRM.

## Benefits

The new solution built around Microsoft Great Plains, Microsoft CRM, and the i-Quote .NET-based application has shortened immixGroup's sales processes by as much as half, and helps give management insight and control over operations that would have been impossible under the former system. Using an integrated solution based on Microsoft software to manage the most significant aspects of its business also allows immixGroup to derive optimal value from its investment in technology.

### Reduces Time Needed for Sales Quotes and Orders by 50 Percent

“Our new Microsoft business management system allows our sales reps to create a complex quote and process an order for a customer in less than 30 minutes,” Bottoms says, “less than half the time needed under the previous system.” The product information from the inventory control system, Microsoft Great Plains, is always current. The quote creation tool makes it easy to apply volume purchasing discounts or other adjustments to the sales quotation.

“This means salespeople spend far less time getting product information and more time talking to customers to determine their needs,” Bottoms says.

### Helps Eliminate Data Entry Errors

The end of duplicate keystrokes helps save immixGroup time and money, and helps to eliminate most data entry errors. “The great thing about the new solution is that information flows automatically between Microsoft CRM and Great Plains,” Bottoms says. “There’s no

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For more information about ePartners, call (888) 883-9797 or visit the Web at:

[www.epartnersolutions.com](http://www.epartnersolutions.com)

For more information about Management Information Consulting call (703) 845-5800 or visit the Web at:

[www.micinc.com](http://www.micinc.com)

For more information about immixGroup call (703) 752-0610 or visit the Web at:

[www.immixgroup.com](http://www.immixgroup.com)

requirement for duplicate data entry to confuse the ordering process and no opportunity to introduce errors.”

**Promotes More Effective Customer Service**  
The integrated solution will allow immixGroup to consolidate information from the company’s technology industry clients and allow immixGroup to provide clients a consolidated monthly report that describes all transactions they had with immixGroup.

And the automated process allows salespeople to quickly and easily create contracts or sales quotes for customers from state or local governments, or even customers who need to purchase outside a government contracting schedule. Says Bottoms, “We can now increase our service levels for customers and increase our accountability to them.”

In addition, the combination of Microsoft CRM and Microsoft Great Plains provides immixGroup the ability to allow their key clients to project sales. “We plan to put up a portal [this year] that allows clients to see for themselves what quotes are in the system, what’s the next quarter’s forecast, what the product mix might be,” Bottoms said. “We see this as a huge differentiator for us.”

**Supports Company in Managing Fast Growth Cost-Effectively**  
The ability of the company to forecast sales

more accurately helps immixGroup to continue its rapid growth without an escalation of costs. “The sales forecasting that our Microsoft CRM system gives us allows us to forecast cash flow. It means we don’t ‘outrun our headlights.’ It means I can hire one person instead of five to handle the next \$40 million in sales growth,” Bottoms says.

In addition to the seamless entry of sales and accounting information, the Microsoft solution allows salespeople, accounting staff, financial managers, and top executives to have “dashboard” reports in real time on the status of both customer orders and overall company operations. Instead of collecting data from several stand-alone spreadsheets in order to create sales forecasts, all company executives can now access a common database of business information and build forecasts with ease.

Finally, the automated quotation creation process gives the sales force some flexibility in how to generate and prepare complex sales quotes to meet customer needs. At the same time, an automated process also allows the company to enforce business rules that were difficult to follow consistently under the old system.

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that

### Software and Services

- Microsoft Windows Server System™
  - Microsoft Windows 2000 Server
  - Microsoft SQL Server 2000
- Microsoft Office System
  - Microsoft Office Excel 2003
- Microsoft Visual Basic .NET 2003
- Microsoft Dynamics
  - Microsoft CRM
  - Microsoft Business Solutions–Great Plains

### Partner Solutions

- Management Information Consulting i-Quote
- Scribe Software Scribe Insight

### Partners

- ePartners
- Management Information Consulting

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.com/dynamics](http://www.microsoft.com/dynamics)

