



lead and innovate

Overview

Country or Region: United States

Industry: Management services—
Outsourced managed services

Customer Profile

Examination Management Services Inc. (EMSI) is a leading provider of medical information, risk management, and investigation services to insurers, employers and healthcare firms.

Business Situation

With many distinct business units sharing many of the same customers, EMSI needed a robust, easy-to-use customer relationship management solution flexible enough to meet unique needs.

Solution

Working with Microsoft Gold Certified Partner Pariveda Solutions, EMSI implemented Microsoft Dynamics CRM Online for one business unit, and then moved the solution on-premises when another division joined.

Benefits

- More proactive sales operations
- Flexibility to adapt to business needs
- Low total-cost-of-ownership
- Familiar and efficient technology



Services Provider Boosts Sales Efficiency by Using Integrated CRM Solution

“We can now track how our representatives are faring in terms of meeting their goals at any point in the week—not just at the end of the reporting period.”

Stacy Hanson, Senior Vice President of Sales, ICS Merrill, a division of EMSI

Examination Management Services Inc. (EMSI) offers a broad portfolio of services to businesses in a number of industries, which makes managing those customer relationships particularly difficult. When the company decided to implement a customer relationship management solution that could replace its many stand-alone tracking and management applications, it decided on Microsoft Dynamics CRM because of its tight links to Microsoft Outlook and flexibility to accommodate unique needs. With help from Microsoft Gold Certified Partner Pariveda Solutions, EMSI deployed Microsoft Dynamics CRM Online for its insurance services group, and then moved to the on-premises solution when another major business group joined the solution one year later. Enjoying greater insight into sales activity, sales groups at EMSI are more disciplined and proactive in pursuing opportunities.



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EMSI

Situation

Headquartered in Scottsdale, Arizona, [Examination Management Services Inc. \(EMSI\)](#) provides medical information, risk management, and investigation services to insurers, healthcare organizations, employers, law firms, and government organizations. EMSI operations are divided into three major groups, each of which operates separately but share many clients, including hundreds of insurance companies, insurance brokerages, and health services clients.

“We have several distinct sales operations within our company, each with unique needs. But, we still can benefit from sharing information because we often sell to the same customers,” explains Jane Severson Kelly, Vice President of Marketing and Communications at EMSI. “Typically, we will work on winning an agreement with a large organization to provide our services, but then we need to approach agents, distributors, or other representatives within that network to win their business. Previously, we had no method for managing the complexity of that sales process. Our Sage ACT! software was aging, difficult to use, and had problems syncing data,” says Severson Kelly. “We wanted to increase the effectiveness of our sales organization, but needed a more powerful tool to gain insight into our relationships with thousands of customers across the country. In addition, we wanted more flexibility in the solution so that we could adjust to the changing needs of the business.”

Other sales groups at EMSI faced similar challenges. ICS Merrill, the investigation division of EMSI and the largest single-source provider of claim investigations in the United States, used GoldMine CRM software from FrontRange Solutions to track customer contacts. “The functionality

of our system was limited,” explains Stacy Hanson, Senior Vice President of Sales at ICS Merrill. “And, it did not integrate well with tools that sales representatives used in their day-to-day activities. Because of this, we used GoldMine CRM for managing sales contacts, but not much else. We relied on a lot of manual processes and spreadsheets to track prospects and put together our sales pipeline. Every week, each sales representative would spend at least an hour reporting on this information and our sales director would spend a whole day compiling reports. Still, the timeliness and quality of the data was such that we would frequently wait until the next week’s report before we had enough confidence to take action.”

To solve these problems and provide insight into shared customers, EMSI needed a new customer relationship management solution that filled the following requirements:

- **Integration with other business systems.** Because of acquisitions made over 30 years, EMSI accumulated a number of disparate business systems. The new customer relationship management software needed to easily integrate with these systems so that sales representatives could access relevant information in one solution.
- **Sophistication in managing contacts.** The new solution needed to handle thousands of customer contacts, different types of client relationships, and shared customers across different business divisions.
- **Flexibility to accommodate changing business needs.** As EMSI works to meet its customers’ evolving requirements, the customer relationship management solution needed to accommodate business process changes.
- **Ease of use.** Instead of burdening sales representatives, the new solution would

ideally eliminate mundane reporting requirements and empower them to sell more effectively.

Solution

Searching for a suitable solution, EMSI compared [Microsoft Dynamics CRM](#), Siebel CRM from Oracle, the latest version of Sage ACT!, and Salesforce.com. Despite the fact that EMSI used Oracle for financial accounting, the company decided against its Siebel CRM software because of onerous setup fees and other upfront costs. "We didn't feel the expense to implement a solution from Oracle was justified when we had our own in-house IT expertise that could manage those tasks," says Severson Kelly. "In addition, the subscription costs for the online Oracle software were nearly double those for Microsoft Dynamics CRM Online." EMSI also considered Salesforce.com but wanted the option to host the solution on-premises in the future—something that is not possible with Salesforce.com. At the time, Salesforce.com also charged 62.5 percent more for each user subscription per month than Microsoft Dynamics CRM Online.

Implementation and Training

In contrast to other solutions, Microsoft Dynamics CRM offered the right mix of robust features, technical flexibility, and ease of use. EMSI decided to implement Microsoft Dynamics CRM Online in the insurance-related sales unit with help from Microsoft Gold Certified Partner [Pariveda Solutions](#). "Unlike the required setup services required with Siebel CRM, we had a choice to bring in Pariveda, which focused on business logic and things that provided real business value," says Severson Kelly. Little more than a year later, the sales group at ICS Merrill also decided to adopt the solution. At that point, EMSI brought the solution on-premises. EMSI again worked with Pariveda to migrate the

solution and integrate it with the case management system at ICS Merrill.

"EMSI started with the online version of Microsoft Dynamics CRM and then moved to the on-premises version as its needs matured. This flexibility is something unique to Microsoft Dynamics CRM," says Matt Rosen, Vice President at Pariveda Solutions. "EMSI also took advantage of the role-tailored capabilities of the solution for an experience that fits the needs of each business unit while also providing a 360-degree view of shared customers."

Pariveda moved existing contacts and account histories to the new solution. "It was very important to us that we did not have to maintain the old system to access historical information," says Hanson. ICS Merrill worked with Pariveda to configure the solution to fit the group's specific business processes. "We set up the new solution so that sales representatives can easily access information and functionality from their case management solution from within Microsoft Dynamics CRM," says Hanson. "They do not need to switch between two systems. And, information entered in one system is automatically updated in the other, so there are no duplicate entries. You can see a list of orders, the dates of those orders, the status of each case, and even click through to go directly to the case to view the invoice or case-related information."

In addition to formal training for the new solution, EMSI identified champions who can help teach their peers how to use Microsoft Dynamics CRM for the greatest impact.

"Microsoft Dynamics CRM has made organizing my day easy. It lets me stay on top of the sales cycle by generating follow ups, call backs, and sales opportunities and

Fast Facts About EMSI

Claims investigation capacity	<ul style="list-style-type: none">• 500 investigators• 9 locations
Service area	More than 15,000 cities and rural areas in the United States, Guam, and Puerto Rico
Paramedical capacity	<ul style="list-style-type: none">• 230 offices• 5,000 professionals• 1,000 physicians
Call centers	5

by displaying them all in one place," says Tom Ceres, Regional Sales Manager at ICS Merrill. "The easily accessible marketing lists let me identify clients for cross-selling opportunities and keep current prospects on our radar. All of this results in more sales."

Sales and Marketing Functions

Sales representatives at EMSI use Microsoft Dynamics CRM to complete day-to-day tasks, including [tracking customer contact activity](#). This steady stream of up-to-date information automatically rolls into managerial tools and reports, such as the sales pipeline. "Our stance now is: 'If it's not recorded in Microsoft Dynamics CRM, it didn't happen,'" says Severson Kelly. "Our sales representatives used to keep their own notes and spend one or two hours each week filling out a report. Now, they use Microsoft Dynamics CRM in Microsoft Outlook to record their activity. It has required a tremendous cultural change, but one well worth the effort. Now, our sales representatives can focus on selling and our managers can focus on managing. Overall, it's much more efficient and effective."

EMSI also uses the solution to manage sales contests where sales representatives compete to make the most outbound calls, for example. Marketing professionals at EMSI use the solution to [track email campaigns](#). "We linked together Microsoft Dynamics CRM with our CoreMotives email marketing system so that the two systems work seamlessly together and we can measure the effectiveness of our marketing campaigns," says Severson Kelly.

Lead Follow-Up and Service Tracking

ICS Merrill takes advantage of the solution to follow up on leads gathered at industry conferences. "We attend numerous local and national trade shows each year and can

come away from each with many qualified leads," says Hanson. "Microsoft Dynamics CRM makes it easier to monitor the follow-up on those leads and stores the contact activity so that we are better prepared for the conference where we might meet those people again. We can track the lead sources for appointments, how many contacts we made, and where we won new business. The level of specificity and thoroughness we get from the solution enables me to ascertain our return-on-investment for a particular event in a way not possible before."

Sales representatives at ICS Merrill can more easily follow up on customer contacts because Microsoft Dynamics CRM automatically assigns tasks for 30-day, 60-day, and 90-day follow-ups. ICS Merrill also uses the solution to monitor newly won business. "We've determined the first assignments that we perform for a customer are highly predictive of our future business with that customer," explains Hanson. "Our case management tool communicates with Microsoft Dynamics CRM so that sales representatives are kept up-to-date with what is going on with new accounts. Because the solutions are integrated, our operations and sales teams can collaborate easily."

Companywide Insight

Severson Kelly notes that other business units at EMSI have paid attention to the success of the sales groups after implementing Microsoft Dynamics CRM. "Because EMSI is such a distributed, diverse organization, a large, monolithic customer relationship management implementation would cause too much disruption," says Severson Kelly. "Instead, we've opted for an incremental approach where business units can see the results of Microsoft Dynamics CRM and make the decision for themselves to start using it. There is growing interest in

the solution. People are coming to us and asking how the solution can help solve their particular business challenges.”

Eventually, Severson Kelly hopes to see all of EMSI using Microsoft Dynamics CRM, including five national service centers. “Ideally, we’ll be able to replace as many spreadsheets and other stand-alone management tools as possible within the company,” she says. “During this process, we’ll see increased efficiency and visibility of customer data throughout the organization. Considering we’re only two years into this project, we’ve made great progress so far with very tangible benefits that others can see.”

Benefits

EMSI successfully transformed two of its largest sales groups into more disciplined, proactive operations that can consistently identify and act faster on customer opportunities. Replacing spreadsheets and other isolated tools, Microsoft Dynamics CRM provides a solid foundation for sharing relevant customer information throughout the company while adapting to fit the unique processes of each business unit.

More Proactive Sales Operations

EMSI now has greater insight into sales activity as it occurs, enabling sales managers to make confident decisions faster. “We have tremendous visibility into the sales process, into new opportunities, and into activity that is going on at that moment,” says Severson Kelly. “Before, we had tracking lists, but if someone forgot to follow up, then there was not much else we could do. Now, Microsoft Dynamics CRM works with Outlook to enforce discipline so that we’re not missing out on opportunities.”

Brian Barnes, Regional Sales Director at EMSI, agrees. “Microsoft Dynamics CRM has taken my sales prospecting to the next level,” he says. “The quickly accessible sections, easily assembled campaigns, and user-friendly functionality have helped me close more prospects than ever before. The opportunities section has been exceptionally useful in helping me maintain and manage my best chances for success.”

Hanson says the improvements in visibility helped strengthen the sales organization at ICS Merrill. “We have a more accurate picture of how we are performing, including areas of weakness that we can work to address,” she explains. “We can now track how our representatives are faring in terms of meeting their goals at any point in the week—not just at the end of the reporting period. Microsoft Dynamics CRM has become an indispensable tool for our national sales director and other managers.”

Flexibility to Adapt to Business Needs

EMSI uses Microsoft Dynamics CRM for much more than just tracking sales contacts—savvy business stakeholders like Severson Kelly can easily adapt the solution to support additional processes. “I am not a programmer, but as an administrator in the system, I can change forms and data points and create new custom entities,” she says. “I can create basic workflows and have them in production the next day. We call on our partner Pariveda for more sophisticated tasks, but the ease of customizing the solution is fantastic.”

Partly because of the flexibility of the solution, EMSI continues to find new uses for Microsoft Dynamics CRM. “When we started out, it took some time for people to understand the capabilities of the solution,” says Severson Kelly. “But now, they do understand and keep coming up with new

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additions. Recently, we added functionality to track legal agreements—not only the actual documents, but also reminders about when we need to renew them.”

Low Total-Cost-of-Ownership

EMSI started out with Microsoft Dynamics CRM Online because the subscription offering made sense with only a couple dozen users in one group. And, in addition to saving the company money on up-front hardware and ongoing maintenance costs, that online offering was substantially less expensive than alternatives from Oracle and Salesforce.com. With the addition of ICS Merrill to the same deployment of Microsoft Dynamics CRM, EMSI decided it was more cost-effective to bring the solution on-premises. Unlike Salesforce.com, [this was an option with Microsoft Dynamics CRM](#) and involved no disruption to the people who used the solution. “With Pariveda helping us with the switchover, the move from online to on-premises was seamless,” says Severson Kelly.

Familiar and Efficient Technology

Because Microsoft Dynamics CRM works like Outlook, sales representatives and other employees at EMSI required minimal training in the functionality of the solution. The training that EMSI provided centered on best practices or how to use system capabilities for the most impact in day-to-day tasks.

“One of the most impressive aspects of Microsoft Dynamics CRM, and what convinced me it was the right solution for ICS Merrill, was its similarity to Outlook in terms of look and feel,” says Hanson. “And, with the solution integrated with our case management system, we gain even greater benefits because we can send alerts and assign tasks that relate to the operational side of our business.”

Hanson also appreciates how she can use Microsoft Dynamics CRM to discover new business insights. “With our GoldMine CRM solution, there was not much we could do to change our views of the data,” she says. “But, with Microsoft Dynamics CRM, I can easily create an activities view or investigate data in new ways. I didn’t realize it would be so simple to get the information we were looking for.”

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 in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. 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 EMSI products and services, call (602) 288-4488 or visit the website at:

www.emsinet.com

For more information about Pariveda Solutions products and services, call (214) 777-4600 or visit the website at:

www.parivedasolutions.com

To contact Matt Rosen, Vice President and CRM Practice Leader at Pariveda Solutions, call (214) 777-4678.

Additional Resources

- [More information on the types of integration possible with Microsoft Dynamics CRM.](#)
- [Details on Microsoft Dynamics CRM for professional-services organizations.](#)

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.com/dynamics

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