

A close-up photograph of a person's hands typing on a black laptop keyboard. The person is wearing a silver ring on their left ring finger. The background is blurred, showing a dark blue sweater and a red object.

## 18-YEAR CONSULTING FIRM FINDS CRM SUCCESS WITH QUANTACRM METHODOLOGY

### CUSTOMER

#### Veracity Solutions

- Industry: Consulting
- <sup>a</sup> Revenue: Less than \$10 million

### CHALLENGE

- Low CRM adoption
- Lack of CRM know-how
- Inefficient prior CRM customization
- Painful software upgrade process

### SOLUTION

- Microsoft Dynamics CRM Online Professional
- Microsoft Dynamics CRM Online Essential
- OnTrack CRM Adoption System

### RESULTS

- Sales performance visibility
- Accountable, engaged sales team
- Time savings with customer mailings
- Measurable event follow up
- Increased ROI

Veracity Solutions helps small and medium-sized enterprise software development companies release



products quickly by managing and mentoring development groups into high performance teams. This proprietary approach, called “blendsourcing,” has helped Veracity build an 18-year reputation as the industry’s go-to consulting firm. Organizations that produce software rely on Veracity to help them shorten time to market, inject innovative ideas, tackle technical problems, and hit deadlines.

#### CUSTOM CODE AND PAINFUL UPGRADES

Veracity had employed Assistance PSA (Professional Services Automation) with Microsoft Dynamics CRM but had not been successful in implementing the core CRM functionality in a manner that met their unique business requirements. Their first implementation involved undocumented custom code that made upgrades a painful process. Veracity wanted to increase the benefit from Assistance PSA, do away with burdensome customizations, and gain the benefits of core CRM functionality paired with CRM best practices.

#### LEARNING TO OVERCOMING PAST OBSTACLES

Veracity considered transitioning from Dynamics CRM to Salesforce but found that Dynamics, if implemented correctly and deployed to a trained sales team, would be more cost effective. Success with this system depended on having the right partner. Veracity vetted as many as 10 potential partners for its implementation, ultimately choosing the QuantaCRM team because of their methodology in teaching CRM best practices, which could resolve Veracity’s past obstacles.

For their solution, Veracity used 60 Professional and 15 Essential Microsoft Dynamics CRM Online licenses, as well as an OnTrack CRM Adoption subscription. **Dynamics CRM Online Professional** is the recommended choice for sales teams. It provides licensed users with access to sales, service, and marketing capabilities for a significantly lower price than comparable offerings from other partners. **Dynamics CRM Online Essential** is designed for organizational users who are not necessarily tied

“Veracity vetted as many as 10 potential partners... ultimately choosing the QuantaCRM team because of their methodology.”

to sales, services, or marketing functions, but who still require specific access to activities management and feeds.

The **OnTrack CRM Adoption System** is a structured approach designed to ensure maximum return on CRM investment, first by focusing on short-term success with the initial CRM rollout and then emphasizing ongoing and expanded Dynamics CRM Online training and usage. OnTrack is a fixed-price subscription service that comes with a money-back guarantee.

Veracity saw potential in Microsoft Dynamics CRM and knew that other companies had used it to succeed beyond their initial objectives. What was missing at Veracity was a partner who not only had a systematic approach to CRM implementation, but who also had the ability to train a team on using the solution's built-in functionality.

#### TIMELY TRAINING ON A PROVEN SOLUTION

Veracity succeeded in getting the unique benefits it sought in a CRM system by avoiding the “we’ll make it do whatever you want” promise of some vendors. Instead, they adopted QuantaCRM’s **proven, structured methodology to CRM implementation**. Many Veracity stakeholders resisted the decision to standardize, because they did not want to learn new processes. Internal resistance was high and slowed improved Dynamics use, but management was insistent and persistent in its commitment to engaging the CRM solution in business procedures.

The seasoned CRM experts on the OnTrack CRM Adoption team walked Veracity through a step-by-step CRM implementation, providing convenient coaching and training through live sessions and on-demand videos. OnTrack lent a cadence to the process, and OnTrack coaches provided an “outside authority” that could be appealed to for “established business practices” that would push through internal resistance to change.

#### ACCOUNTABILITY, TIME SAVINGS, AND ROI

Today, Veracity has **greater compliance with its processes and better understanding among users** of the value of CRM. Shortcomings are evident with review of CRM reports and dashboards, and Veracity is

able to track sales activity, enforce a systematic sales approach, and hold the sales team accountable. The data provided by CRM helps the Veracity sales team improve their processes and practices.

Due to the implementation of Dynamics CRM, the scope of endeavors at Veracity has increased. They have introduced a **lead generation** program called “champion reach outs,” in which fans of Veracity are contacted on a regular basis. In the past this was done sporadically using spreadsheets, but with CRM it’s a regular activity designed to increase customer engagement and lead flow.

Another process formerly controlled by spreadsheets and improved by CRM is Veracity’s **annual Christmas card mailing**. Every year Veracity sends collector quality Christmas cards to select customers. Now, instead of using time-consuming spreadsheets, they created a view in CRM that allows the client development team to select who should be included in the mailing. This has saved months of time, and staff members have been surprised by how simple the mailing list selection process has become. Plus, since the card recipients are in a CRM list, Veracity can measure response.

In addition, Veracity is now **planning events** through CRM. In the past, they had events at movie theaters for prospects and customers, but cumbersome spreadsheet management dragged down their ROI. With CRM, Veracity is increasing their follow-up and sales activities by tracking invitees, attendees, and the registrants who didn’t attend – then scheduling appropriate follow-ups for sales people and measuring their results. This transparent process helps Veracity achieve a greater return on investment.

## About QuantaCRM

QuantaCRM is a Microsoft Dynamics CRM Online and Microsoft Dynamics 365 reseller based in Chicago, providing national sales, consulting, implementation, training, and technical support to small and medium-sized businesses.

Visit [www.quantacrm.com](http://www.quantacrm.com) to learn more.

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