

## CASE STUDY

# Microsoft Dynamics CRM implementation for Behavioral Science Technology BST

## SCOPE

The scope of the project was to take better advantage of the existing business opportunities and add new ones while at the same time increase the level of customer satisfaction.

Licenses management is another area that needed to be covered by the new system. For every product created, BST assigns licensing options for a determined period of time.

“

*Essensys guided us through the design process suggesting efficiencies we hadn't thought about. The software had been tested by Essensys and worked very well once we started our own testing. During testing, they were very responsive to our questions about usage and quickly made changes that we requested. The documentation was complete and very helpful.*

Darlene Hoogan-Beebe  
BST

”

## BENEFITS

- ✓ **Minimal costs** due to the program being based on familiar knowledge and didn't require specialized training for the BST team
- ✓ **A much more efficient system** that implied **less effort and man power** to organize the processes
- ✓ **Instant access to information** for all people involved in the sales and marketing process
- ✓ **Superior reporting capabilities**
- ✓ **Less time** to address a problem, **less money** spent on logistics
- ✓ A considerable **decrease in paper usage** to organize in files
- ✓ **Rapid implementation** and data transfer from the old system and the creation of the now existing



BST is a global safety consulting firm that helps organizations create injury-free workplaces. Since 1979, when BST pioneered behavior-based safety, we have established a reputation for innovation and thought leadership that helps our clients reduce incidents, engage employees, and achieve world-class safety performance that supports operational excellence.

BST solutions have been put to work at more than 3,200 locations in 71 countries in over 30 languages.

The corporate headquarters are based in the United States, with regional offices in Brazil, Switzerland, South Africa, Australia, and Singapore.

Every BST engagement is a promise to the employees and organizations we partner with to provide the highest quality solutions, guidance, and insight for safety performance improvement.

“

*Working with Essensys has been one of the best development partnerships we have engaged in at BST. Management of the projects, communication, technical expertise, documentation, and QA have all been outstanding. What is most appreciated is Essensys's capability to seamlessly work with us to see our projects through from the very early stages through deployment and post deployment revisions with no surprises. The fact that our most recent development project was able to “quietly” go live to a production environment speaks for itself.*

Kevin Rickard  
BST ”

## ANALISYS

Because BST has a global sales network, the company required a data management system that could centralize all available data.

The advantage of such a system was that it made it possible for all members of the sales and marketing team to team to access client data at any time and analyze business opportunities as they appear to create real support for sales.

The secondary function required was to keep a historical database of all incidents created by clients.

BST's sales process imposed the creation of multiple roles with different functions along the sales and customer retention workflow. On account of the complexity of the sales process, BST also needed a good management of the status report of their opportunities.

## SOLUTION

The functions and demands from the new system lead to the implementation of Microsoft Customer Relationship Management (Dynamics CRM). Microsoft CRM was the obvious choice due to its compatibility with all Microsoft systems and the fact that it operates in Microsoft Outlook which is familiar to most users.

Our team tailored Microsoft CRM so that it can respond to our client's needs. We created all the necessary modifications so that all of the needs of the BST sales and marketing team were being met. And so, the solution proposed by Essensys was the perfect answer - a friendly and familiar interface, a system integrated solution, a faster program that could save a lot of time and work and a better organized structure for the inside information.

The Essensys team also had the task to integrate the new CRM system with the existing ERP. The Microsoft CRM would share information with the ERP system so that all the people involved in the process could have a clear idea of customers' activity.

