

Leading Consulting Firm Improves Marketing and Encourages Teamwork with CRM Solution

When the partners and principals at PwC's Strategy& needed more transparency and clarity around client information, they chose Microsoft Dynamics CRM Online both to boost marketing efforts and to bridge geographical divides across the company.

Results

- Improved collaboration globally
- Clear information about clients now available to the company's partners and principals
- More control over when and how to include clients in various marketing efforts

Industry

Professional Services

Country or Region

United States

Customer Size

3,300 employees

Number of Users

1,200

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"The solution we built on Microsoft Dynamics CRM Online helps our partners think more strategically about how to serve their clients and stay in touch."

Adrienne Crowther, Director of Global CRM and Collaboration,
Strategy&

PwC's Strategy&, the oldest continually existing management consultancy in the world, serves and shapes the senior agenda of the world's leading institutions. Drawing on the talents and insights of more than 3,000 staff in 57 offices around the world, the company works with clients to identify and build the differentiating capabilities they need to compete successfully.

Recently, Strategy& launched a renewed focus on "client-centricity." "We wanted more emphasis on who our clients are and how we can serve them best," explains Adrienne Crowther, Director of Global CRM and Collaboration. But with regionalized systems for tracking clients—and inefficient digital mailing processes—it was difficult to discover information such as who knows whom at a particular company, what content clients were receiving, and who were alumni of Strategy&.

"We needed to move beyond the email with the subject line 'Who knows someone at Company X?'" says Crowther. "We were ready for a global CRM platform."

Choosing CRM in the Cloud

To ensure that the solution would be adopted by its user base, Strategy& required that the solution work seamlessly and reliably with Microsoft Outlook. Explains Crowther, "We don't have a traditional sales force. We have partners with sensitive, high-powered contacts stored in Outlook—C-level connections, people who are heads of business in major industries. We had to ensure reliability and high quality of contact information. Nothing could be lost."

Strategy& chose Microsoft Dynamics CRM Online as the platform for a new, global CRM system called Client Connect. "We knew that our partners would demand the very best integration with Outlook," says Crowther. "Plus, Microsoft Dynamics CRM Online fits in with our cloud-based IT philosophy."

Sharing Contacts While Safeguarding Privacy

The rollout of Client Connect posed a number of challenges for the geographically dispersed company. "We combined 45 regional marketing data sources, including a homegrown alumni database, Excel spreadsheets,

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Pearl Nartey, Senior Manager
Strategy&

Implementation Partner

Hitachi Solutions

Hitachi Solutions Group prides itself on helping our clients to compete with the largest global enterprises with powerful, easy to use, and affordable industry solutions built on Microsoft Dynamics CRM. With a balanced view of strategy, people, process and technology, we work with companies to understand their unique business needs, and provide focused industry solutions to improve their business. From business strategy development through application deployment and maintenance, our consultants are committed to helping clients quickly realize measurable business value and achieve sustainable ROI. We offer a client-focused, collaborative approach and transfer knowledge throughout each engagement.

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a live InterAction platform, and four different Salesforce instances," explains Pearl Nartey, Senior Manager at Strategy&. "We had a bit of everything with many duplicates across our sources. Data cleansing was difficult, to say the least."

After the initial data quality issues were resolved, Strategy& deployed a digital marketing platform within Client Connect. The next task was to get all partners and principals at the company to share their contacts and sync with Client Connect. "The beauty of Microsoft Dynamics CRM Online is that it's a live platform," says Nartey. "You have the most up-to-date information on your clients. But that means everyone must sync with the platform."

Many partners worried that confidential notes saved with their Outlook contacts would be lost or would sync and no longer be private, so Strategy& added functionality to safeguard that information and ensure that data saved in private fields would not be synced or overwritten.

Wide Adoption and Success

The company piloted Client Connect in June 2013 in the United States and then rolled it out to all offices in North America and Russia. The initial rollout achieved more than 90 percent engagement. Today, over 95 percent of all partners and principals sync their contacts with Client Connect, which maintains over 175,000 client contacts and 18,000 alumni contacts across the enterprise.

Strategy& benefits from Microsoft Dynamics CRM Online in several ways:

Improved global collaboration. Client Connect connects Strategy& regions, providing insight into who is known globally within a company and a simple process to conduct effective global campaigns.

Clear, authoritative, up-to-date information about clients for use by partners and principals. "Our partners own the relationships with their clients, but with multiple partners connected to the same client, information is more consistently up to date," says Crowther. "And while some partners worried about loss of control, we deployed a highly successful offshore data steward team to review changes made to contacts."

More control over when and how to include clients in marketing efforts. Client Connect provides insight into what content a client has received so Strategy& can be selective about which marketing efforts clients are subscribed to. For instance, a partner can opt a client in or out of an email newsletter.

"Over 95 percent of partners and principals are syncing their contacts with the platform. This is exactly the level of engagement we hoped to achieve and the basis for a strong foundation to build upon," notes Crowther. "Client Connect, built on Microsoft Dynamics CRM Online, helps our senior team think more strategically about how to serve their clients and stay in touch."

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

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