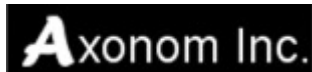




Microsoft Business Solutions Customer Solution Case Study



Independent Solution Vendor Builds High-End CRM Solutions for Vertical Industries

Overview

Country or Region: United States

Industry: Information Technology

Customer Profile

Axonom is a mid-market-focused independent solution vendor that provides high-end customer relationship management (CRM) solutions based on Microsoft® technologies. The company focuses on the financial services, high technology, and not-for-profit industries.

Business Situation

Already providing customers with CRM solutions that fully integrate with Microsoft Outlook® and use Microsoft Web technology, Axonom was in a strong position to embrace Microsoft Business Solutions CRM as the foundation for a powerful, new product line.

Solution

Axonom designed a suite of modules based on Microsoft Business Solutions CRM, adding deep functionality to satisfy the needs of high-requirement businesses.

Benefits

- Low-cost alternative to other high-end systems
- Broader customer base—more than 100 customers in first 16 months of sales
- Increased revenue

“Our strategy of providing vertical solutions on top of the Microsoft CRM platform has been the cornerstone of our success.”

Clark Dircz, CEO, Axonom, Inc.

When Microsoft® Business Solutions CRM version 1.0 was announced, Axonom was quick to embrace the application as the foundation for Powertrak, a Web-based, feature-rich customer relationship management (CRM) solution that provides businesses with high-functioning CRM solutions. The Axonom team already had a successful six-year track record building CRM solutions using Microsoft technologies. Building on that experience, Axonom developed a suite of 30 modules that focuses on the financial services and high technology manufacturing and distribution industries, and adds deep functionality to Microsoft CRM. Together, Powertrak and Microsoft CRM provide a robust, scalable, integrated solution that is a low-cost alternative to high-end systems like SAP or Siebel. Axonom’s success is evident in increased revenues and an expanded customer base—with more than 100 Powertrak and Microsoft CRM cust

Situation

Axonom, Inc. has been in the business of providing powerful customer relationship management (CRM) solutions based on Microsoft® technologies for a long time. The offspring of a company that provided mid-size companies with proprietary Web-based CRM solutions, Axonom was born to create presence around Powertrak, a new product offering built on Microsoft Business Solutions CRM.

Axonom's experience with CRM solutions began in 1998 when Chief Executive Officer (CEO) Clark Dircz founded Intertrak Corporation to promote his eCRM solution, Worldtrak. Worldtrak was written as a module within Microsoft Office Outlook® 2003, then emerging as the world's most pervasive e mail messaging and scheduling program. The familiar Outlook 2003 interface proved to be an easy-to-use tool that salespeople could embrace with a minimum of time and effort.

Worldtrak inspired a product line that included nine modules to help companies organize, document, schedule, and track customer accounts. Businesses could customize their solutions by adding functionality to meet specific needs. Worldtrak quickly became a leading CRM solution and was recognized in the industry as one of the top applications for mid-market segment companies.

Success with Worldtrak and the tremendous growth potential of the CRM market segment led the company to scale operations quickly, assembling a world-class management team and launching Worldtrak version 4.5 in 2000.

In 2002 when Clark Dircz and his team were notified that Microsoft was about to offer its own solution targeted at small and mid-size businesses, the company infrastructure and leadership, as well as a strong relationship

with Microsoft, were already in place to refocus efforts on the new application.

"We were made aware that the product was coming and were provided with alpha-level code because of the close working relationship we've had with Microsoft over the years," says Clark Dircz, Axonom's CEO.

Dircz reorganized his company and founded Axonom in early 2002. The first independent software vendor (ISV) to verify its application for Microsoft CRM, Axonom introduced Powertrak version 6.0, a 30-module suite only 30 days after Microsoft shipped Microsoft CRM.

Solution

Powertrak is built on the foundation of the successful Worldtrak product line. "We feel that the Microsoft CRM product will be a dominant horizontal player in the industry. Once we had the code, we began the process of porting the CRM functionality, which we had spent eight years developing, over to the Microsoft CRM product line," says Axonom's CEO. "This was a key strategic outcome for us."

Axonom ported the Worldtrak CRM functionality to the Microsoft .NET Framework and the technologies used with Microsoft CRM. "We had done all the heavy lifting in terms of functionality and were able to ensure seamless integration with Microsoft CRM relatively easily," says Dircz.

Solution Infrastructure

The initial Axonom solution included a suite of 30 modules built on top of Microsoft CRM, running on the same basic Microsoft Web application stack, including Microsoft SQL Server™ 2000, Microsoft Windows® 2000 Server and Microsoft Windows Server™ 2003 operating systems, and Microsoft Active Directory® directory service. The resulting solution means businesses have no

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Clark Dircz, CEO, Axonom, Inc.

additional infrastructure requirements to run the combined solution.

Powertrak extends the functionality of Microsoft CRM in the form of powerful core modules that add marketing, e-commerce, Internet portal, call center, technical case management, XML integration and advanced workflow capabilities. The solution can be provided as licensed software or in an ASP-hosted environment. Users can work from within Outlook to handle daily customer interactions, thereby helping to keep track of important information in one place.

Because Powertrak was developed using Microsoft Visual Studio® .NET 2003 development system, it can be extended easily to third-party systems through Microsoft BizTalk® Server 2002. Powertrak also can be extended to industry-specific services, such as Profiles+ Forecaster from Financial Profiles, Inc. using Web services and the industry-standard Simple Object Access Protocol (SOAP). In addition, an optional Powertrak module integrates Microsoft CRM with Microsoft SharePoint® Portal Server 2003, adding a more robust knowledge management extension to the solution.

Industry-Specific CRM Solutions

From a vertical standpoint, the company had traditionally sold in three vertical markets. Two of these—financial services and high technology multichannel manufacturers and distributors—became a major focus for a Powertrak development.

The Powertrak wealth management and high-technology industry solutions for Microsoft CRM are scalable, Web-based applications that provide robust, industry-specific capabilities. In addition to Microsoft CRM and core Powertrak modules, businesses can deploy modules that support specific industry requirements and integrate easily with

enterprise resource planning, back-office, and other systems.

Customer-focused Development

In the two years since the release of Powertrak, Axonom has added more modules to its Microsoft CRM solution suite. “The decision to develop a module is very much customer- and partner-driven. We have a formal product planning process in which we talk to customers, look at industry trends, and study the competition. We also get a lot of feedback from partners who sell into our target market segments. This feedback essentially provides us with a roadmap of where we need to go with the product,” says Dircz.

Axonom is a Microsoft Certified Partner and Authorized Microsoft CRM Reseller, and the company has been named to the Microsoft Business Solutions President’s Club for its commitment to customers and sales achievement. Following in the footsteps of its earlier product line, Powertrak recently won the Top 15 CRM Software Award for Small and Medium Businesses given by ISM, Inc., a leading strategic advisor for CRM; this award represents the eighth time Axonom or one of its products have been recognized.

Benefits

Powertrak extends Microsoft CRM to provide a low-cost alternative to the high-end solutions offered by competitors. The company’s close relationship with Microsoft provides Axonom with a number of benefits, including access to an expanded customer base and vertical market opportunities.

Provides a Low-Cost Alternative to Other High-End Systems

Together, Powertrak and Microsoft CRM are a robust, feature-rich solution that can compete with high-end systems, such as Oracle Systems, SAP, Siebel Systems, and Onyx Software, as well as other well-entrenched

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Clark Dircz, CEO, Axonom, Inc.

competitors in the mid-market segment, such as SalesLogix from Best Software. Axonom and its partners have landed some significant wins for Microsoft CRM because Axonom offers additional capabilities, such as call center scripting, product configuration, and partner portals to manage leads. By combining these capabilities with Microsoft CRM, Axonom can design a high-functioning system that meets specific business requirements. “With rich functionality, proven integration, and some very robust modules, we can provide businesses with solutions that are significantly lower in cost, time, and effort than other high-end systems,” says Dircz.

Expands the Customer Base

Axonom believes that using Microsoft as the underlying application for Powertrak is a strong differentiator from competitors. “Microsoft has come up with a good first release,” says Dircz. “We’ve signed deals in the last nine months that we have been chasing for three or four years.” Currently, Axonom and its partners have more than 100 Microsoft CRM customers.

Customers working with Axonom get a lot of lift from the company’s eight years of experience in CRM. “It’s easier to sell Microsoft CRM to customers who are looking for rapid implementation, consistent safety of the solution, and value-added integration. We can satisfy a great range of customer requirements with technology that’s seamless and easy to adopt,” says Michael Belongie, Axonom’s Senior Vice President, Sales and Marketing. In addition, the company continues to expand its reach through strategic partnerships with other Microsoft partners and channel distributors. About 90 percent of Axonom’s business is through partners certified in Microsoft CRM in the Microsoft Business Solutions channel. The company also has several direct

specializations that an internal sales force handles directly.

Benefits from Vertical Market Opportunities

Experience with financial services and high-tech industry requirements has enabled Axonom to develop industry-specific functionality for Powertrak and Microsoft CRM customer solutions. These solutions add feature-rich modules in a bundle or incrementally, an option that can help companies get up-to-speed quickly, control costs, and minimize change management issues. “A key to our strategy is that we go deeper and deeper, vertically, as Microsoft continues to broaden the reach of Microsoft CRM,” says Dircz.

For example, wealth management firms now compete aggressively to provide a full range of financial services and effectively help customers manage their investment portfolios. By understanding the financial industry’s challenges and opportunities, Axonom focuses its vertical solution on automating complex customer-facing processes, providing self-service opportunities for a firm’s customers, ensuring that firms meet SEC compliance requirements, adding technical case management and time and billing, and integrating with back-office and other industry systems.

As high-tech manufacturers and distributors expand into new market segments through complex sales channels, a combined Microsoft CRM and Powertrak solution can help them manage multichannel relationships with customers and partners and expand their presence worldwide. Axonom’s Microsoft CRM industry solution focuses on self-service for customers and management tools for dealer loyalty, partner product authorization, and staff certification. In addition, the high-tech solution offers tight

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integration with other business, manufacturing, and distribution systems.

Customer Success Story

Compellent Technologies, a global data storage solutions company, sought a complete IT infrastructure that could help it compete effectively in a highly competitive marketplace. Compellent provides its solutions through a tight network of 22 business partners and knew that a CRM system would be critical in helping to manage those relationships.

In addition to relationship management and tracking, Compellent wanted services such as lead management and product configuration tools to be made available to its partner organizations. Also, the CRM solution would need to be seamlessly integrated with Microsoft Business Solutions—Great Plains® back-office and manufacturing solution.

Axonom implemented Compellent’s CRM solution, deploying Microsoft CRM with Powertrak to extend its capabilities and create a powerful, self-service Internet portal for partners. The secure portal, which is accessible via Compellent’s Web site, is the primary way the company and its partners share business information. “Virtually every tool that a business partner would need to use to conduct their storage practice is available via the portal,” says Michael Beach, Director of Sales Operations for Compellent.

In addition to providing tools and information to its reseller partners, Compellent has realized other benefits from implementing Microsoft CRM and Powertrak including:

- Quick and early adoption of the new solution by both Compellent and its business partners
- Scalability to accommodate rapid company growth

- Insight into company performance with integrated sales and business data
- Ability to build precise revenue and manufacturing forecasts.

“With Microsoft CRM, we have the ability to see every potential deal our business partner community is working to close, months and months out into the future,” says Beach.

Axonom’s portfolio of successful customer implementations continues to grow as the company gains momentum with its combined Microsoft CRM and Powertrak solution. The company’s years of experience with CRM, its long-standing partnership with Microsoft and commitment to Microsoft CRM, and its ability to provide a product with low total cost of ownership (TCO) will ensure Axonom’s success.

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 who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. 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 Axonom products and services, call (888) 814-2880 or visit the Web site at: www.axonom.com

Microsoft Business Solutions

Microsoft Business Solutions offer integrated business applications and services that allow small and midsize organizations and divisions of large enterprises to connect employees, customers, and suppliers for improved efficiency. The financial management, customer relationship management, supply chain management, and analytics applications work with other Microsoft software, including the Microsoft Office System and the Windows operating system, to streamline processes across an entire organization. This gives businesses insight to respond rapidly, plan strategically, and execute quickly. Microsoft Business Solutions are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company's needs.

For more information about Microsoft Business Solutions, go to: www.microsoft.com/businesssolutions

Software and Services

■ Products

- Microsoft Office 2003 Professional
- Microsoft Office Outlook 2003
- Microsoft Visual Studio .NET 2003
- Microsoft BizTalk Server 2002
- Microsoft Windows 2000 Server

■ Solutions

- Microsoft Business Solutions CRM
- Microsoft Business Solutions–Great Plains

■ Technologies

- Microsoft .NET Framework
- Microsoft Active Directory

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