



Microsoft Dynamics Partner Solution Brief



Software Developer Offers Suite of Multi-Channel CRM Modules for High Tech Companies

Overview

Country or Region: United States

Industry: Information Technology

Partner Profile

Axonom, Inc. is a CRM and PRM Mid-Market company offering enterprise-wide relationship automation modules for the Microsoft Dynamics CRM Platform.

Business Needs

High tech businesses must handle complex sales channels and business relationships that require software capabilities outside and deeper than a standard CRM application.

Solution

To meet the complex business needs of high tech manufacturers, Axonom built a suite of specialized high-tech, multi-channel industry modules for Microsoft® Dynamics™ CRM.

Benefits

- Streamlined development of complex, industry-specific solution
- Strengthened market position
- Greater business opportunities

“Dynamics CRM 4.0 not only offers the underlying infrastructure with all the standard CRM functionality we need; it provides open, clear paths for extending that functionality and integration to meet any specific requirements.”

William Barrow, CTO, Axonom

High tech companies must handle complex sales channels and business relationships that require capabilities beyond and deeper than a standard customer relationship management (CRM) application. These include multi-level relationship tracking, web self-service, support portals, multilingual capabilities, and management tools for business partners, forecasting, and multicurrency payment options. To meet these needs, Axonom leveraged the power and flexibility of the Microsoft® Dynamics™ CRM platform to develop Powersphere, a suite of highly specialized, multi-channel modules for the high tech industry. With Powersphere, Axonom offers High tech companies the extended Partner Relationship Management (PRM) and integration capabilities they need, along with an optimized user experience to empower workers to more effectively manage the industry’s complex business relationships and sales channels.



Business Needs

Since 1998, Microsoft® Gold Certified Partner Axonom has been a pioneer in providing powerful customer relationship management (CRM) software. It developed a successful product line that continued until 2002, when Microsoft announced its plans to develop a CRM application. Axonom saw this as a great opportunity to provide even more powerful, flexible CRM solutions and remain on the forefront of CRM software development.

According to Michael Belongie, Axonom's Senior Vice President, Sales and Marketing, "We bet on the Microsoft Dynamics™ CRM platform from the beginning and it was the best business decision we have made. By allowing Microsoft to provide the CRM platform and standard capabilities, we have been able to develop increasingly deeper and more sophisticated solutions and do so in a fraction of the time."

The partnership with Microsoft has empowered Axonom to focus its efforts on developing CRM solutions to meet the

challenging demands of its high-tech manufacturing customers. Businesses in this industry must handle complex sales channels and business relationships that require software capabilities outside and deeper than a standard CRM application. Among these are the needs for multi-level relationship tracking, web self-service, support portals and management tools for business partners, forecasting tools, multicurrency payment options, and multilingual capabilities.

Solution

To meet the complex business needs of high tech manufacturers, Axonom offers a suite of specialized high-tech, multi-channel industry modules with Partner Relationship Management (PRM) capabilities for Microsoft Dynamics CRM. The suite, called Powersphere, optimizes the user experience for organizations selling and servicing through channels by providing views and tools to manage complex extended relationships, including:

- **Powertrak Pipeline Manager:** Allows in-line editing of opportunities within Dynamics CRM, thus eliminating the need to open each record. It is completely configurable without coding; and similar editable grids can be built against virtually any data items. (See Figure 1.)

- **Powertrak Enterprise Views:** This is an extension of the activity, contact, and opportunity view functionality of Dynamics CRM 4.0. With this enhancement, users working with accounts that have sub accounts, can quickly and easily view consolidated activities, contacts, opportunities and channel/partner opportunities for all sub accounts associated with the enterprise.

- **Powertrak PowerRelate:** This extension leverages the expanded metadata relationship capabilities in Dynamics CRM

Figure 1 – Powertrak Pipeline Manager provides completely configurable in-line editing capabilities.

Topic	Customer	Estimated Revenue	Closing Probability	Est. Close Date
Powertrak V9 Sneak-Preview	ABC News-NY	8500.00	75	02/21/2008
Powertrak-rules	ABC News-NY	8500.00	80	02/28/2008
Powertraks V9 is in store now	ABC News-NY	50000.00	40	03/02/2008
Core, Portal, Forecaster	ABC News-NY	80000.00	75	01/31/2008
Casters Forecasting deal through Nike	Casters	100000.00	80	06/26/2008
Get money	Casters	0.00		
PT V9 Conference - ATL	CBS News	10000.00	10	
PT Conferences at Atlanta	CBS News	30000.00	50	
Raven Test	cbs news	0.00	1	
Core, Portal, Forecaster	Dallas	200000.00	80	03/31/2008
Powertrak V9, Portal, Forecaster	Green Bay	30000.00	80	
Shop opp activity tree test	Green Bay	0.00		
Tech Case Management	Indianapolis	16000.00	80	
IT Services deal at Microsoft	McLennan-HQ	50000.00	50	04/24/2008
Professional services project at MS HQ	Microsoft	150000.00	10	03/31/2008
Powertrak V9, Portal	New England	100000.00	80	
Certification	New York	40000.00	80	
Portal, Generic Mapper	Primatich	5000.00	50	
Sharepoint 07, Powertrak V9	San Diego	23000.00	50	04/18/2008
Training	SAP	90000.00	80	
Partner Portal deal through Microsoft E	Semiflora Central	50000.00	50	02/28/2008
Powertrak V9	Tampa	0.00	80	

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Michael Belongie, Senior VP, Sales and Marketing, Axonom

4.0 to present many-to-many, hierarchically-branched trees of relationships between accounts, contacts, activities, and opportunities.

Axonom Powertrak Modules in the High Tech Powersphere Suite include: Partner and customer portals; a product configurator; a call center with branched, dynamic scripting; specific modules for forecasting, time and billing, and event management; and modules to support service management and mobile workers. Because each module is separately integrated with the Dynamics CRM platform, Axonom can tailor the solution to include just those modules each customer requires to meet their specific needs and budget.

Customization through Extension and Integration

According to William Barrow, CTO, "Dynamics CRM offers not only the underlying infrastructure with standard CRM functionality; it provides open, clear paths for extending that functionality and integration. If we tried such extension and integration with other products, we would have had to rewrite every change. However, the SDK approach and web services of Dynamics CRM made it easy for us to extend and integrate as needed to get into the high tech market with a solution that is specifically tailored to that industry's needs."

He adds, "Because Dynamics CRM is based on .NET technology, we were also able to build an application—Powertrak Application Builder—that wraps around Dynamics CRM, enabling Axonom staff, our partners, and customers to rapidly modify and extend features of both Powertrak and Dynamics CRM."

Examples of Extended CRM Functionality in Powertrak:

- **Forecasting:** Dynamics CRM offers pipeline management. Thanks to the flexibility of the platform, Axonom was able to extend that functionality to create a module that offers sophisticated forecasting and analysis for a variety of business needs, from individual products and channel partners to combinations of products by territory, partner, and time periods.

- **Product Configurator:** The Product Configurator module was built to be extended through the Powertrak Partner Portal to give channel partners the ability to configure quotes and orders in real-time via the Web and have those quotes automatically integrated via workflow into Dynamics CRM.

- **Self-Help Service:** Axonom also extended the service functionality of case management within Dynamics CRM 4.0, making it possible for business partners and end customers to interact with Dynamics CRM data through both the Axonom Partner Portal and Axonom Customer Portal.

Flexible Integration Capabilities

In addition to the powerful capabilities provided by the tight integration between Dynamics CRM and the Microsoft Office applications, Axonom offers customers the ability to integrate with almost any application from within Dynamics CRM, including back-office ERP systems, third-party payment applications, and computer telephony integration.

Axonom accomplished this integration by developing a non-programmers tool kit, Application Builder, by which bridges can be built between Dynamics CRM and the customers' other applications. So, if a customer has invested in other applications, displacement is not an issue because the Powertrak end-user can interact with data

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from third-party applications and systems through their CRM interface.

Smooth Migration to Dynamics CRM 4.0

Axonom is very enthusiastic about the many improved and additional features and functionality in Dynamics CRM 4.0. Barrow was equally enthusiastic about the ease by which they were able to move their solution to Dynamics CRM 4.0, stating, "We were able to almost immediately leverage the expanded power and functionality of CRM 4.0 with only minor changes to Powertrak, and without having to re-engineer the solution."

The following are some of the improved and additional features and functionality that will expand and deepen the strength of Powertrak:

- **Metadata Relationships:** Dynamics CRM 4.0 offers new ways to manage data and the relationships between entities. This empowers Axonom to meet the needs of its customers to access their data in more complex ways, such as multiple look ups into accounts, contacts, etc.
- **Microsoft Windows® Workflow Foundation:** Windows Workflow Foundation provides Axonom with the leeway to execute some of the complex business processes they weren't able to execute previously.
- **Reporting and Analytics:** Powertrak offers over 100 reports and Axonom has developed its own dashboard to extend the reporting capabilities of Dynamics CRM and Microsoft SQL Server® Reporting Services. Using the improved ability to create and customize CRM entities in CRM 4.0, Axonom was able to link external data to CRM entities to provide improved reporting. According to Belongie, "We leverage Dynamics CRM as a 'mash-up tool' where data can be pulled together from multiple integrations and databases

for more comprehensive reports." In addition to pulling data into CRM for reporting, CRM data can be pushed into Powertrak for analytics, including field level auditing.

Benefits

Streamlined Development of Complex Solution

By combining the power and flexibility of the Dynamics CRM platform with its own industry-specific knowledge and CRM expertise, Axonom was able to quickly enter the complex high tech industry with a sophisticated CRM solution tailored to the specific needs of that vertical.

Strengthened Market Position

Axonom is confident that the improved functionality of CRM 4.0 will continue to strengthen their position in the CRM market and help them go even deeper into the high tech vertical.

Greater Business Opportunities

The expanded deployment and multilingual capabilities in CRM 4.0 will lead to greater business opportunities previously outside the reach of Axonom's solutions.

- **Multi-tenancy:** The multi-tenancy capability of Dynamics CRM 4.0 means that customers have the power of choice to deploy their CRM application in a partner-hosted scenario. This will not only empower Axonom to work more effectively with their current customers, but will also open doors to more business opportunities with both current and potential customers for whom a hosted environment would be attractive.
- **Multilingual Capabilities:** Dynamics CRM 4.0 now allows a single installation to have multiple active languages. Because the high tech industry is by nature a global business, Axonom sees this capability

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providing yet another avenue to greater business opportunities.

Belongie concludes, “The combination of Dynamics CRM 4.0 and Powertrak 9.0 is enabling our organization to deliver increased ROI to our high-tech customers. With each new release of Dynamics CRM, the bet we made in 2002 has continued to pay dividends for both Axonom and our customers.”

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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