



## Microsoft Dynamics Customer Solution Case Study



**Customer:** VisionShare

**Web Site:** [www.visionshareinc.com](http://www.visionshareinc.com)

**Customer Size:** 65 employees

**Country or Region:** United States

**Industry:** Healthcare

**Partner:** Axonom

### Customer Profile

VisionShare is a leading supplier of secure connectivity software and services to the healthcare industry. It is based in Minneapolis, Minnesota.

### Software and Services

- Microsoft Dynamics™
  - Microsoft Dynamics CRM 3.0
  - Microsoft Dynamics GP 9.0
- Microsoft® Server Product Portfolio
  - Microsoft SQL Server® 2005

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[www.microsoft.com/resources/casestudies](http://www.microsoft.com/resources/casestudies)

## CRM Solution Helps Healthcare Connectivity Provider to Boost Revenue 115 Percent

“Due to the success of the Microsoft and Axonom solution, we are positioned to support 100 percent revenue growth in each of the next two years. This project has been essential to our company.”

Steve Smerz, Chief Information Officer and Vice President, Technical Operations, VisionShare

*VisionShare—a provider of secure data connectivity for the healthcare industry—was outgrowing its home-grown systems. So, the company adopted Microsoft Dynamics™ CRM and Axonom Powertrak. The combination is a fully integrated solution that automates and speeds the customer installation process. The result: Backlog is down 51 percent, and business is up 115 percent without the need to increase service staff in 2008.*

### Business Needs

Federal legislation has put pressure on the more than 700,000 healthcare providers and payers in the United States to ensure the security of the electronic patient information they send and receive. That's where VisionShare comes in. The company uses secure Internet connectivity to replace slower and more expensive dial-up or other connectivity solutions.

When an order comes in, the VisionShare sales, service, and finance operations must capture technical information about the customer, price the order, confirm the sale,

forward an installation ticket to the VisionShare technology services group, track and confirm the installation, and invoice the customer. VisionShare managed this process with a custom software system.

“There were a lot of manual activities that had to happen because our software didn't capture it all,” says Steve Smerz, Chief Information Officer and Vice President, Technical Operations, VisionShare. “The result was that we relied on e-mail—which was less than optimal, since e-mail messages could go astray or be overlooked.”



E-mail delayed the sales and installation process. That time was expensive for VisionShare, which—according to accounting rules—couldn't book revenues until an installation was completed. Call center employees didn't have full access to technical information, further delaying customer service. The company's backlog grew. VisionShare needed a more scalable solution.

## Solution

VisionShare now has a solution to meet tremendous growth, thanks to Microsoft Dynamics™ CRM business software and Powertrak from Microsoft® Gold Certified Provider, Axonom.

"We looked at several systems," says Smerz. "We chose the Microsoft and Axonom solution because we thought the components worked well with each other—and worked well with our people and with our current business systems software, especially Microsoft Office Outlook 2007. And we chose Axonom because we were impressed by the quality of their people and the depth of their understanding of our business model. They didn't just install a product; they tailored a solution to our unique business requirements."

Microsoft Dynamics CRM and Powertrak automate much of the process of managing the customer's installation of the VisionShare solution, so that process can happen more quickly and cost-effectively, and the company's operations can scale as needed.

Microsoft Dynamics CRM enables VisionShare executives to track customer information through the familiar Microsoft Office Outlook® messaging and collaboration client that they already use, eliminating the need to open and use a separate customer relationship management (CRM) solution. Workflow in Microsoft Dynamics CRM notifies VisionShare

sales agents that they need to contact customers to further the sales process. When a customer order is approved, the Powertrak software, as configured by Axonom for VisionShare, automatically generates an installation ticket that is forwarded to the VisionShare technology services staff.

Additional Powertrak logic automatically generates e-mail "reminder" messages to customers, encouraging them to provide required technical information. The solution is also integrated with the VisionShare Certificate Authority to process and track security documents related to the digital certificates that VisionShare issues to customers. When an installation ticket is closed, the solution sends an automatic notification to the Microsoft Dynamics GP accounting system, which books revenue faster than VisionShare could do so before.

The solution runs on a trio of blade servers: one computer for Web server and application software, one for Microsoft SQL Server® 2005 database software, and one for Microsoft Dynamics GP software.

## Benefits

"Due to the success of the Microsoft and Axonom solution, we are positioned to support 100 percent revenue growth in each of the next two years," says Smerz. "This project has been essential to our company and supports our vision of becoming the leading secure electronic connectivity platform for the healthcare industry."

Smerz points to statistics that bear out that claim. The solution has helped cut the backlog of installation tickets by 51 percent. The number of tickets that run 90 days or more is down by 87 percent. The number of

trouble tickets that are closed in the same day has risen by 14 percent.

Smerz attributes that increased effectiveness and speed to the automated workflow enabled by Microsoft Dynamics CRM and Axonom Powertrak. "Our call center agents used to spend their days tracking the status of customer orders and sending e-mails to request more information or to ask a customer to return paperwork," he says. "The solution automates much of that process so that customers are up and running with our software 40 percent faster and call center agents can focus on the tasks that really require their expertise."

The Microsoft and Axonom solution has also enabled remote employees to be more productive, because authorized users can gain access to the information they need to help customers. In the past, remote employees used virtual private networking or other connectivity solutions that were more cumbersome, more expensive, and that provided less-than-complete access.

The result: VisionShare revenues increased by 115 percent in 2007 and the company maintained a 98 percent customer renewal rate—without corresponding increases in staffing in IT or finance for 2008.

Smerz expects revenues to double in 2008 and 2009. The Microsoft and Axonom solution enabled VisionShare to launch a new product in 2007, a self-service Web portal that individual healthcare providers can use to securely upload information to Medicare. "Thanks to the automation provided through Microsoft and Axonom, we can offer a solution to a new market segment and price the solution cost-effectively for that segment," says Smerz. "We couldn't have done this any other way."