

Microsoft CRM meets information needs in recruitment game

Specialist recruitment company, **antonapps**, has implemented Microsoft CRM to track and manage its candidate information and client interactions – key operational areas that could benefit from improved efficiencies. While the requirement for a multi-user CRM environment was the trigger point in the decision to migrate from the previous contact management system, ease-of-use and reliability played a significant part in the choice of the Microsoft tool set.

Microsoft CRM integrated directly into the .Net framework, making use of existing applications such as Microsoft Exchange and SQL Server. This ensured the application could work closely with all existing Microsoft applications including the Microsoft Office suite.

Microsoft Gold Certified partner, IS Partners, provided consulting services to define **antonapps'** business requirements and also handled the implementation and customisation of the Microsoft CRM system.

Business Situation

antonapps specialises in the placement of professionals in the finance and investment banking areas. The company further offers training and consulting services, and remains a “partner for life” to candidates throughout their careers.

“Placing a financial director or senior Chartered Accountant necessitates an enormous amount of knowledge about that person and their professional background. We need to ensure that the recruiting Finance or HR department is eager to meet the candidate and that the candidate is excited about the prospective employer. This involves understanding the needs of both parties and marketing this information accordingly,” say Anton Apps, director of the company.

The CRM system would have to provide supporting functionality around the information it holds to ensure, for example, that consultants can quickly extract information to present to clients.

For this reason, the database of individuals needs to be well documented and information captured in a clear and concise way. All interactions between **antonapps** and our clients and candidates also need to be tracked. “Microsoft CRM provides us with the capabilities to ensure greater control and finesse in bringing clients and candidates together,” says Apps.

antonapps also needed a CRM system that offered user options. “While Microsoft CRM could be easily integrated in our existing Microsoft

Customer Profile

antonapps is a leading private firm which builds relationships between key players in finance and banking. They introduce distinctive individuals to intelligent opportunities, includes BEE or Affirmative Action Chartered Accountants; senior Investment Banking product specialists; senior Finance, Tax, Audit, Risk and Compliance professionals.

Established in 2004 by a Chartered Accountant with 10 years international experience in banking, finance and recruitment.

About IS Partners

Established in 2001, IS Partners addresses the need for quality implementations of Microsoft solutions. A Microsoft Gold Certified Partner, IS Partners has competencies in Business Intelligence, CRM, Information Worker and Business Scorecard solutions, specialising in empowering sales, marketing, financial and management in its customer base. This includes various industries, such as retail, distribution, manufacturing hospitality, insurance, media and the public sector, and is achieved through a proven streamlined implementation methodology.

Pre-built solution sets are underpinned by the best product components and the multi award-winning expertise. IS Partners **PERFORMANCE!** Methodology ensures implementation is fast tracked in an efficient, predictable and risk-free manner. This is achieved through a proven track record, on chosen market sectors and world-class technology.

environment, with an Office interface everyone is familiar with, it could also be customised to suit our specific business requirements,” he adds.

Making CRM work

IS Partners ensured visual customisation of screen layouts so the system was directly relevant to **antonapps'** information input requirements, for example, the firm requires candidate ID numbers and fields for notes on appearance and profile. The system also had to relate activities to all business contacts to maintain accurate records of the firms' interaction with candidates and clients as well as interactions between clients and candidates themselves which are facilitated by the firm.

This functionality will be extended to track and measure interactions for management reporting purposes. “Our consultants contact clients and candidates for various reasons. A phone call might be made to market a candidate or follow up on an interview. Statistics on the number of calls made or messages left are key inputs that need to be measured in our business, which is ultimately based on percentages and numbers. Measuring input is critical in determining output.

“They system will also provide us with future workflow capabilities whereby interview reminders or maps can be automatically sent to candidates or tasks generated to ensure consultants follow up with clients for feedback. A full audit trail will ensure the work is getting done,” Apps says.

Benefits

“Microsoft CRM is a robust system and has satisfied our needs to accommodate the data on which our business depends. It provides a secure, central repository of information that can be presented in a usual format.

“By having a dedicated place to capture information we have also reduced risks. In our line of business information is power, and it's easy to become unstuck because a seemingly small question was not asked right in the beginning or our interaction with the client or candidate. Quality of information is key, and CRM ensures we can control the process through which this information is obtained and, thus, the quality of conversations with candidates and clients,” Apps says.

From a consultant's perspective, stratifying the database and making it searchable has further streamlined the process of matching people to placements. Candidate files can also be taken offline, on a laptop for instance, preventing duplication of information. By being able to transfer information gathered at client sites directly into the system, operations have been improved through time savings and less paperwork.

“IS Partners played a critical role in ensuring the CRM system looked the way we wanted it to, and operated in line with our requirements,” Apps adds.

IS Partners' Awards

Dynamics Best Customer Service Partner 2008;

Dynamics Partner of the Year 2008;

Microsoft Winning Customers Initiative Partner of the Year 2008;

Microsoft Business Solutions Partner of the Year 2008;

Information Worker (BI) Microsoft Worldwide Finalist 2008;

Named to Microsoft Dynamics President's Club 2008

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