

# RSM! McGladrey

Accounting | Tax | Business Consulting

**“With its Outlook integration, Microsoft Dynamics™ CRM improved our efficiency by standardizing the access to our data. For us, it was a big selling point.”**

AMC Delancey Group is a private real estate investor with a commercial portfolio that includes multi-family, office, retail, industrial, hospitality and land. Their assets extend throughout all of the East Coast and their most recent projects include Senior and Independent Living Communities.

*“Microsoft Dynamics™ CRM was very easy to customize. Without any formal training, I was able to create custom Entities and modify fields according to our specific needs. If more instruction is needed, I also have access to Microsoft resources including hot fixes, knowledge base, and phone support. RSM McGladrey was also a just phone call away and can offer their support as needed.”*

— Walter Barrett  
AMC Delancey Group, Inc.

## Background

AMC Delancey was managing their contacts using two non-integrated systems, Goldmine® and Microsoft Outlook. They also used Goldmine® to administer their real estate agreements. They faced a big challenge with this setup because information was not easily shared between departments.

## Project

RSM McGladrey implemented a 12 user Microsoft Dynamics™ CRM Business Solution as a replacement for their Goldmine® system. Dynamics CRM would allow them to share

information among the departments, manage their real estate activities throughout an agreement, and integrate with Microsoft Outlook in real-time.

AMC Delancey has since expanded access to the Dynamics CRM data to include research where they can track trends, real estate conditions, and statistics on their assets.

## Outcomes

- Formed a centralized database
- Improved efficiency through consistent data entry
- Integrated access to data across multiple departments
- Created a common Microsoft platform among business management systems
- Customized system according to unique needs of business model
- Self-managed system with full support from Microsoft and RSM McGladrey