

RSM! McGladrey

Accounting | Tax | Business Consulting

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Burlington County is the largest County in New Jersey covering 827 square miles. It consists of 40 municipalities, 3 cities, and 31 townships.

Background

Burlington County’s Department of Information Technology wanted to replace an existing CRM system that provided them with more automation and customizations they could manage themselves. It was equally important that this change did not lock them into one version of the product.

Project

RSM McGladrey implemented a 40 user license of Microsoft Dynamic™ CRM Business Solution to the Information Technology Department. Burlington County uses the system to track IT/Information Technology support calls and manage projects from 29 County Departments.

Requests for support from emergency service personnel only – EMS, Fire, Police, can be added to the CRM system automatically from a submission on their website, manually via email, or when a call is answered. An acknowledgement is automatically sent to the caller.

CRM Workflows are initiated when a request is identified as critical or high priority. High priority cases are given 3 hours to close. Otherwise, it alerts the rest of the division to ensure it’s been addressed promptly. Critical cases, on the other hand, immediately alert the supervisor and after 1 hour, if it’s still open it alerts the rest of that division’s team.

Supervisors can check on the status of any division’s tickets through the views or reports. Automatic alerts are also implemented for notification of any outstanding tickets.

“We are now totally automated thanks to Microsoft Dynamics™ CRM. A large portion of the automation is dependent on Workflow which we manage ourselves. The use of Workflows has made our jobs easier, added automatic alerts based on activities, and provided timely messages with intricate details. This is a cost and time saving option when compared to the manual emails we were sending prior. Now, the intricate details are entered in the system once, and through workflow, updated in the appropriate places.”

— Dorea Boyle
County of Burlington, New Jersey

Outcomes

- Increased productivity through use of CRM Workflows
- Alerts automatically sent to management on key issues
- Integrated systems provides intricate details on all methods of communications
- Savings on cost and time when compared to manual processes employed prior to new system being installed