



## Microsoft Business Solutions Customer Solution Case Study



### Overview

Country/Region: United States  
Industry: Human Resources  
Administration

#### Customer Profile

Established in 1997 and based in New York City, Ambrose Employer Group, LLC is a leader in providing outsourced human resource, payroll, and employee benefits administration services to small and medium-sized companies.

#### Business Situation

Ambrose sought a user-friendly customer relationship management (CRM) solution that could integrate with its existing Lawson HR system and help the company avoid data entry errors, effectively share knowledge, and improve customer service.

#### Solution

Through the combination of Microsoft® Business Solutions CRM and Scribe Insight, Ambrose is able to more effectively share information, address clients' needs, and improve client service.

#### Benefits

- Time savings of 20 to 30 hours weekly
- Improved customer service
- Increased sharing of information
- Faster response times
- Ability to retain knowledge

## Leading HR Administrator Boosts Customer Service Efforts with CRM Solution

“Microsoft CRM clearly has had an incredibly positive effect on our ability to service our clients. Its ability to help us proactively muster internal resources to attack an issue has been a tremendous plus.”

Greg Slamowitz, Co-Chief Executive Officer, Ambrose Employer Group, LLC

In today's highly competitive business environment, providing outstanding service remains the most effective method of retaining clients, keeping the competition at bay, and achieving continued business success.

So, when Ambrose Employer Group, LLC, a New York City-based provider of outsourced human resource, payroll, and employee benefits administration services, sought to give its human resource specialists the tools they needed to provide superior client service, the company turned to Microsoft® Business Solutions CRM.

Ambrose deployed Microsoft CRM and Scribe Insight, and integrated both with the company's existing Lawson HR system. As a result, Ambrose is saving time and benefiting from additional access to powerful client information, enhanced reporting, and improved customer service.



## Situation

Since 1997, Ambrose Employer Group, LLC has been a leader in providing outsourced human resource, payroll, and employee benefits administration services to small and medium-sized companies across the United States.

Based in New York City, with an office in Wellesley Hills, Massachusetts, Ambrose offers comprehensive employee benefits—such as payroll, health, dental, and retirement plans, employer risk management, human resources (HR) practices, and government compliance—plus back-office administrative services to firms in the financial services, business services, and technology industries.

The company's traditional services are supported by a Web-based human resource technology platform that provides a turnkey solution for Ambrose's approximately 300 clients, which range in size from a handful of employees to more than 300. In effect, Ambrose acts as a virtual human resource, payroll, and benefits department for these client organizations. Employees access a Web site, which is part of Ambrose's Lawson HR system, to enroll in their benefits program, see their summary plan description, view pay stubs, and perform other activities associated with their benefits.

"Ambrose prides itself on providing clients with high-quality service and a platform of benefits and services typically reserved for large companies," says Greg Slamowitz, the company's Co-Chief Executive Officer. While the company's existing Lawson HR system contained the information its human resource specialists needed, the system wasn't overly user-friendly, Slamowitz says.

For example, viewing employee information and sending employee communications and notices required a series of time-consuming manual processes, and Ambrose's human resource specialists lacked an easy way to record interactions with the clients they served.

In addition, as Ambrose continued to grow, its senior managers realized that the company lacked a central repository for client information. As a result, Ambrose faced a wealth of issues, including:

- **Lack of management information.** Ambrose's senior managers lacked an efficient way to keep tabs on what the company's HR professionals were doing on behalf of their clients. "We had no way to view open and closed cases and no way to analyze them to determine trends and areas where business processes could be changed or amended," Slamowitz says. "In effect, we didn't have a strong handle on what our people were doing."
- **Inability to retain knowledge.** Ambrose experienced difficulties keeping accurate records of interactions with clients. "It was difficult remembering what we did for our clients six months or a year ago," Slamowitz says. In addition, if an Ambrose employee were to leave the company, much of his or her account knowledge left as well.
- **Difficulties preparing client reports.** If a client requested a report about Ambrose's activities on its behalf, company employees had to scramble to pull together the information from various sources, including paper files, e-mail messages, and their own

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Andrew Heller, HR Associate, Ambrose Employer Group, LLC

recollections—often a difficult and time-consuming task.

### Solution

Ambrose sought a customer relationship management (CRM) solution that could integrate with the company’s Lawson HR system and make it easier for its human resource specialists to perform their jobs, avoid data entry errors, and, perhaps most importantly, boost customer service efforts.

As a professional organization, the service Ambrose provides its clients is critically important. “There’s nothing like getting called in to visit a client and not having all the facts,” Slamowitz says. “And, without a CRM solution, we didn’t always have a good command of the facts.”

Ambrose evaluated a number of popular CRM solutions, including GoldMine, which the company’s sales staff had previously used. But those solutions either lacked the functionality or ease-of-use Ambrose sought. The company also considered solutions from some of the bigger players in the industry. However, “with our size organization—about 50 employees—we couldn’t justify the cost of those systems,” Slamowitz says.

Ambrose also looked at Microsoft® Business Solutions CRM—and took an immediate liking to the power, features, and functionality it provided. “Microsoft CRM has a very user-friendly interface,” Slamowitz says. “It looks very familiar to us because we use Microsoft Outlook® heavily. In addition, the tight integration with Outlook was a key factor in Ambrose selecting Microsoft CRM,” says Andrew Riell, Ambrose’s Systems Administrator.

The company also found Microsoft CRM to be easy to implement and integrate with its existing Lawson HR system—activities that were completed entirely in-house. Ambrose’s IT Director, York Pang, completed the Microsoft CRM implementation in less than two weeks, while Riell spent approximately one week implementing Scribe Insight, from Scribe Software, based in Bedford, New Hampshire. In a process that took slightly more than an hour, Riell then used Scribe to migrate more than 7,000 employee records as contacts from Lawson into Microsoft CRM. In addition, Riell successfully moved 28 fields from Lawson into Microsoft CRM.

With Microsoft CRM and Scribe Insight, Ambrose’s HR professionals now enjoy easy access to powerful information about their clients. Scribe Insight captures any changes and additions made within the Lawson HR system and updates that data in Microsoft CRM every five minutes. As a result Ambrose’s human resource specialists enjoy near-real-time access to clients’ updated files. When a new employee is entered into the Lawson HR system—which can happen as often as 50 times a day—Microsoft CRM and Scribe Insight automatically update all related databases and entries.

### Benefits

With Microsoft CRM and Scribe Insight, Ambrose is reaping a number of benefits, including:

#### Increased Sharing of Information

Microsoft CRM acts as a powerful knowledge base, putting a wealth of information at the fingertips of the Ambrose employees who need it. For example, before taking action on a client’s HR issue, Ambrose’s service representatives can quickly refer to the

subject tree in Microsoft CRM to see how the company has dealt with similar cases and to learn who in the organization can help them resolve the issue. With that information, “We’re able to close issues much more quickly and much more efficiently than in the past,” Slamowitz says. “That makes our clients much happier.”

In addition, Microsoft CRM and Scribe Insight allow Ambrose’s management to keep a keen eye on the types of cases the company’s HR professionals are handling for their clients. That information helps management be proactive in helping address client-service issues. “With the information we get from Microsoft CRM, we can proactively approach an HR specialist and say, ‘I saw the case you just opened, and it’s something we’ve dealt with before; you’ll want to go speak to so-and-so to resolve it,’ ” Slamowitz says.

Ambrose’s HR specialists have noticed—and appreciate—the change. “Microsoft CRM helps management and my colleagues view the cases I’m working on. They can see how I’m doing and provide assistance—sometimes when I didn’t even know I needed the help,” says Andrew Heller, an Ambrose HR Associate. “That way, we can quickly steer the case in a new direction, if necessary.”

### Significant Time Savings

Before implementing Microsoft CRM and Scribe, Ambrose’s process of scanning for new employee updates, sending welcome e-mail messages, and mailing information packets to new employees was performed manually by two to three employees. According to Riell’s estimates, the manual process consumed 20 to 30 hours a week. “Now, with Microsoft CRM and Scribe, we’ve been able to go to the next level and create

an automated routine that handles those tasks,” Riell says. As a result, Ambrose employees are now able to dedicate their time and attention to other important job functions.

### Improved Client Service

For Ambrose, being able to provide high-quality client service means being able to identify issues and then dedicate the right resources to solving them. The powerful combination of Microsoft CRM and Scribe Insight help Ambrose accomplish both. “Microsoft CRM clearly has had an incredibly positive effect on our ability to service our clients,” Slamowitz says. “Its ability to help us proactively muster internal resources to attack an issue has been a tremendous plus. And our response times are better because we can track the length of time issues have been open.”

Heller agrees. “Before we had Microsoft CRM, we had to create our own mechanisms for keeping track of information,” he says. For his part, Heller relied upon several notebooks as well as spreadsheets he’d created on his own to track service issues he was addressing. “Now with Microsoft CRM, all the information we need is organized in one place,” Heller says. “That way, it’s easy to find and easy to view—and helps me speed up the client service I provide.”

### Easier Tracking of Client Cases

Ambrose uses Microsoft CRM to record each action, phone call, and e-mail message involved with resolving a client’s HR issue. This ensures that everyone has a detailed and easily referencable history of the case. This is particularly important when resolving complex cases involving multiple people. “Microsoft CRM is a great recorder of fact,” Slamowitz says. “With it, you have an

accurate record of everything that's taken place while working on a case, which means that the 'he-said-she-said' scenarios we often encounter in our line of work are substantially reduced."

### Enhanced Reporting

As with all service organizations, it's important for Ambrose to continually demonstrate the value it provides its clients. Because the company often works with mid-level employees at client firms, those employees may not always keep their superiors apprised of Ambrose's successes. Thus, the company has found Microsoft CRM to be valuable in keeping its clients fully informed. "With Microsoft CRM, we can quickly pull together information and print out a case report for the client and say, 'Here's what we've done for you recently,' " Slamowitz says.

### Ability to Retain Knowledge

Before implementing Microsoft CRM, if an Ambrose employee were to leave the company, much of his or her account knowledge would leave as well. Now, if an employee departs or if the account is reassigned, the new human resource specialist can quickly review the account in Microsoft CRM and speak to the client in a knowledgeable fashion.

## For More Information

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For more information about Ambrose Employer Group products and services, call 212-847-2400 or visit the Web site at: [www.ambrosegroup.com](http://www.ambrosegroup.com)

## Microsoft Business Solutions

Microsoft Business Solutions offers integrated business applications and services that allow small and mid-sized organizations and divisions of large enterprises to connect employees, customers, and suppliers for improved efficiency. The financial management, customer relationship management, supply chain management, and analytics applications work with Microsoft products such as Microsoft Office and Windows® operating system to streamline processes across an entire organization, giving businesses insight to respond rapidly, plan strategically, and execute quickly. Microsoft Business Solutions are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company's needs.

For more information about Microsoft Business Solutions, go to: [www.microsoft.com/businesssolutions](http://www.microsoft.com/businesssolutions)

### Software and Services

#### ■ Products

- Microsoft Office 2003 Professional
- Microsoft Office Outlook 2003
- Microsoft Exchange Server 2003
- Microsoft SQL Server 2000
- Microsoft Windows 2000 Professional
- Microsoft Windows 2000 Server

- Microsoft Windows Server 2003
- Microsoft Windows XP Professional

#### ■ Solutions

- Microsoft Business Solutions CRM 1.2

#### Partners

- Scribe Software
- Lawson Software

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