



## Overview

**Country or Region:** United States

**Industry:** Education—Higher education institutions

### Customer Profile

Located in St. Louis, Missouri, the Brown School at Washington University is a graduate school that specializes in social work and public-health education.

### Business Situation

The Brown School needed a central source of constituent information and corresponding tools to analyze data and dispense targeted campaigns and communications to grow those constituent relationships.

### Solution

The school deployed Microsoft Dynamics CRM and customized the solution to the needs of constituent relationship management.

### Benefits

- Cost-effectively meet the needs of higher education
- Improve constituent insight and relationships
- Run more targeted campaigns, get results
- Expand reach, cut costs

## Grad School Gains Insight into 50,000 Constituents, Grows Relationships by Using CRM System

“With Microsoft Dynamics CRM, we gained the flexibility and ease-of-use that we needed to ensure adoption and establish a central source of constituent information.”

*Ellen Rostand, Assistant Dean for Communications, Brown School*

The George Warren Brown School of Social Work at Washington University in St. Louis, Missouri, is a graduate school specializing in social work and public-health education. To manage its constituent relationships, the school used multiple systems, resulting in a lack of insight and productivity. Attempts to centralize this information and standardize constituent relationship management processes faltered, both with a homegrown solution and a purchased solution that had limited functionality and poor adoption. To establish a centralized source of constituent information, the Brown School deployed and customized Microsoft Dynamics CRM with help from Microsoft Gold Certified Partner Aspect Software. With the solution, the school is achieving the functionality and adoption it seeks and now has the insight it needs to understand and grow its relationships with more than 50,000 constituents.



“What’s appealing about Microsoft Dynamics CRM is that we could transform the typical CRM notion of converting a prospect into a sale into the idea of growing a constituent relationship through data-driven outreach.”

Ben Geers, Director of IT, Brown School

## Situation

Known for its graduate-level social work and public-health education programs, the [Brown School](#) is a highly selective graduate school and a part of Washington University in St. Louis, Missouri. The school has, at any given time, approximately 450 Master of Social Work students, 120 Master of Public Health students, and 50 students in its doctoral program. Supporting teaching, research, and service efforts of the school, Brown School maintains a staff of around 150.

To build and preserve relationships with the people and organizations that provide financial and other support for the school and keep it strongly embedded in the community, the Brown School must maintain contact records for a wide range of people and organizations that interact with the school. These include alumni, donors, volunteers, and public and private organizations that provide internships and job opportunities and fund research and educational programs.

Keeping track of these constituent relationships has been a largely disjointed activity, however, because the school’s academic and administrative departments and research centers maintained constituent information in as many as 16 different systems. “We lacked insight into our constituents,” says Ellen Rostand, Assistant Dean for Communications at the Brown School. “Many of our constituents have multiple relationships with the school; for example, a constituent could be a graduate, an internship provider, and research partner, but we couldn’t identify where that overlap was. Because of this, we didn’t know where the school’s deep relationships were, so we were unable to focus on relationship-building efforts with these individuals. Without a single constituent relationship management

system, staff also spent an inordinate amount of time finding and consolidating information across departments—for example, if the dean needed to prepare for a meeting at a particular organization, it could take days of effort to determine the different ways in which the school interacted with that organization.”

Staff could also potentially send multiple communications to the same contact without knowing, inadvertently annoying constituents or providing an inconsistent representation of the school. Lack of insight into its relationships also meant that the school frequently had print overruns when producing publications and other materials that it would later disseminate to constituents.

To standardize its constituent relationship management process and establish a central repository of constituent information, the Brown School made a foray into business management software and built a homegrown solution that had limited functionality and gained little traction among staff. Needing wider adoption, the school later deployed a commercial customer relationship management (CRM) solution designed specifically for higher education. The school faced similar adoption issues and found the solution difficult to customize based on the school’s unique needs. “The product was not as flexible as we needed it to be,” says Rostand. “It didn’t offer a full-blown development environment, which prevented us from transforming it from a customer relationship management system into a constituent relationship management system. In addition, to get the adoption we needed, we needed a solution that would work the way we are used to working so that people could accomplish tasks without having to drastically change their routines.”

## Solution

In looking for a constituent relationship management system, the Brown School chose [Microsoft Dynamics CRM](#). Says Ben Geers, Director of IT for the Brown School, "We considered several competing options, but only Microsoft Dynamics CRM was flexible enough to meet our needs. In addition, with Microsoft Dynamics CRM, our employees can work through the Microsoft Outlook interface, which 100 percent of the staff already knew and used, helping us get the adoption we needed."

In terms of flexibility, Geers notes that, "Microsoft Dynamics CRM brought flexibility to the table that let us establish a common definition of a constituent while still letting each research center, department, and office track the information that was most meaningful to them."

To deploy Microsoft Dynamics CRM and customize it to the needs of constituent relationship management, the Brown School called on the expertise of [Aspect Software](#), a Microsoft Gold Certified Partner. Working together, the teams have since deployed the solution in a hosted environment that shares server resources with Washington University's Olin Business School, which uses Microsoft Dynamics CRM for its corporate relations efforts.

The solution draws on records for 50,000 individuals and nearly 7,000 organizations. Currently, about one-third of the staff at the Brown School use the solution.

In reaching out to its constituents, the Brown School makes extensive use of a fully integrated email-marketing solution from [ExactTarget](#) that Aspect Software also helped the school to deploy. By using the solution, Brown School communication staff and select research centers can build

targeted email-marketing campaigns and measure the impact of those campaigns. Currently, the school uses the ExactTarget solution for information dissemination, such as sending out research news, transmitting notices of upcoming professional development classes, and facilitating overall communications across the school constituents.

At the Brown School, Microsoft Dynamics CRM found a fast, enthusiastic adoption. Throughout the implementation process, Ted Elsas, Microsoft Dynamics CRM Solution Architect at Aspect Software, worked closely with Geers, Rostand, and their teams. "In all my years of consulting, I have not seen such rapid adoption of a software solution," Elsas comments. "When I do shoulder-to-shoulder training, Microsoft Dynamics CRM users quickly see the value of the software and are actually excited to use the product. The rapid adoption has helped Brown School get exceptional value from Microsoft Dynamics CRM since day one."

Reflecting on the implementation, Geers notes that, "What's appealing about Microsoft Dynamics CRM is that we could transform the typical CRM notion of converting a prospect into a sale into the idea of growing a constituent relationship through data-driven outreach."

## Benefits

For the Brown School, deploying Microsoft Dynamics CRM as its new constituent relationship management system has proven to be the right choice. Says Rostand, "With Microsoft Dynamics CRM, we gained the flexibility and ease-of-use that we needed to ensure adoption and establish a central source of constituent information. Now, we're able to act more strategically in how we engage with constituents, improving such relationships

“By being able to target the right people with the right communications, we’re getting open rates between 20 and 25 percent, which is well above the national average of 16 percent.”

Ellen Rostand, Assistant Dean for Communications, Brown School

while eliminating the tedious, manual processes we relied on before.”

#### **Cost-Effectively Meet the Needs of Higher Education**

The Brown School found that moving to Microsoft Dynamics CRM was a cost-effective decision. Says Rostand, “Our previous solution had a hefty licensing fee, which meant that we were unable to allocate our resources to customization. Microsoft Dynamics CRM has a much more economical licensing model, so we had funds to get consulting, implementation support, the add-in solution from ExactTarget, and customizations that met our needs. Although we spent the same amount on both solutions, we got exactly what we needed with Microsoft Dynamics CRM.”

#### **Improve Constituent Insight and Relationships**

With a single source of constituent information, the Brown School has improved insight into constituents and can act on that insight to grow constituent relationships. For example, the school’s constituents may undergo many professional and life changes. In the past, that could mean the school fell out of touch with a constituent or an organization. But now, the school is able to quickly view who else it knows from an organization and build the relationship anew. Providing an overview of the school’s newfound capabilities, As Rostand comments, “With Microsoft Dynamics CRM, we can effectively elevate a conversation with a person to a long-term relationship. And because we have insight into all our touch points with our contacts and organizations, we can coordinate our interactions and provide a much-higher-quality experience.”

Drawing on readily available constituent information has also simplified the once

cumbersome task of preparing information for the dean. Says Rostand, “Now, if the dean needs to meet with constituents, we can pull those persons’ information up in Microsoft Dynamics CRM and view every communication we ever sent them, along with their profiles.”

#### **Run More Targeted Campaigns, Get Results**

By analyzing the data captured in Microsoft Dynamics CRM, the Brown School can now target select groups of individuals with newsletters and other communications through the add-in solution from ExactTarget. And, because these groups are precise and strategically chosen, the results have been tremendous. Says Rostand, “By being able to target the right people with the right communications, we’re getting open rates between 20 and 25 percent, which is well above the national average of 16 percent. In addition, we’re getting a less than 3 percent return on bulk mail communications, which in some cases is saving us quite a bit of money in return postage and decreasing the amount of staff time needed to process returned mail.”

#### **Expand Reach, Cut Costs**

Having data readily available also means the Brown School now knows how much print material to produce. Says Rostand, “We now have a more accurate count of who needs to receive what, which helps us avoid the high cost of print overruns that were running 3,000 to 4,000 pieces. We’ve also been able to expand our reach. With better insight into our relationships, we’ve been able to expand the distribution of our magazine by 30 percent.”

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

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

For more information about Brown School at Washington University in St. Louis products and services, call (314) 935-6600 or visit the website at:

[brownschool.wustl.edu](http://brownschool.wustl.edu)

For more information about Aspect Software products and services, call (978) 250-7900 or visit the website at:

[www.aspect.com](http://www.aspect.com)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics CRM

### Partners

- Aspect Software