CASE STUDY: BURLINGTON COUNTY

County department automates support calls with Microsoft Dynamics® CRM

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

Background

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

Project

RSM implemented a 40-user license of Microsoft Dynamics® CRM business solution for Burlington County’s Information Technology (IT) Department. Burlington County uses the system to track IT support calls and manage projects from 29 county departments.

In addition, requests for support from emergency service personnel only — EMS, fire, police — can be added to the CRM system automatically from a website submission, email message or answered call. An acknowledgement is automatically generated and sent to the caller.

CRM workflows are initiated when a request is identified as critical or high priority. High priority cases are given three hours to close; otherwise, the system alerts the rest of the division to ensure the case is addressed promptly. For critical cases, on the other hand, the system immediately alerts the supervisor. After one hour, if the case is still open, it alerts the rest of the 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.

Outcomes

• Increased productivity through use of CRM workflows
• Alerts automatically sent to management on key issues

“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, NJ
- Integrated systems provide intricate details on all methods of communications
- Cost and time savings by eliminating manual processes