



Momentum

Recruit+ powered by Microsoft Dynamics CRM helps Momentum place more people in jobs, faster

The New Zealand job recruitment industry is fiercely competitive, with more than 400 agencies in Auckland alone endeavouring to place recruits in the right jobs.

To gain an edge over their many competitors, recruitment agency Momentum Consulting Group knows it is crucial to be the first to present their clients with a quality selection of potential recruits.

The manual and narrow nature of Momentum's existing technology was holding the company's application management process up, making it more difficult for Momentum to quickly match the best recruits with client vacancies.

Through its existing partner, Altair Computer Systems, Momentum chose Microsoft Dynamics CRM as its new Recruitment Relationship Management solution, due to its flexibility, scalability and integration with Momentum's other Microsoft technology.

Immediately after its deployment in April 2007, Microsoft Dynamics CRM Recruit+ has improved the accuracy and visibility of the information held about applicants, allowing the Momentum team to identify, contact and reference check potential recruits for their clients, faster.

Accuracy and speed key to recruitment agency success

Momentum operates nationally, with offices in Auckland and Wellington, and has 60 staff serving the corporate and public sector.

To help their clients achieve success, Momentum holds thousands of curriculum vitae (CVs) in their database, collected through market research, and from CVs submitted to the Momentum website or in response to various media job advertising.

As many of these potential recruits also have their CVs with other agencies, Momentum needs to efficiently analyse their database and contact potential recruits as soon as positions become available. However, Momentum's system was not giving consultants objective and accurate information quickly enough, as Michelle Vogt, National Operations Manager explains.

Solution Overview

"Microsoft Dynamics CRM means that consultants are no longer having to waste time coding and processing the CVs for each of our potential recruits. Instead, they can be out there meeting clients and placing the right people in the right jobs, at the right time – which is now!"

**Michelle Vogt,
National Operations
Manager,
Momentum**

Customer Profile

Momentum was custom-built in 1996 to serve the recruitment industry, and is now based in Auckland and Wellington. Its core business is to provide human resource consultancy services to public and private sector clients and candidates, nationwide.

Web Site

www.momentum.co.nz

Industry

Professional Services

Scenario

Agility
Business Intelligence
Communication and Collaboration
Connected Productivity
CRM
Enterprise Integration
Information Management
Knowledge Management
Reliability

Customer Size

Medium

"Our old system required us to allocate a code to each recruit as a kind of sorting system," Vogt says. "We would analyse a person and choose a code that best described them. Despite training, this was a very subjective way of organising recruits in our system. It also wasn't accurate, as someone would code one way, and others would code another way, so searching using this method resulted in inconsistent outcomes."

"Additionally, staff had to enter the codes manually, often leaving this task until the end of the month. So, if a client came to us with a job opening, we might've already met the right recruit, but if their details hadn't yet been entered into our system an opportunity would be lost."

Microsoft Dynamics CRM: the flexible tool of choice

Having identified a need to improve the accuracy and speed of CV and resume management, and after it was clear that Momentum's existing vendor was unable to implement the necessary improvements, Michelle Vogt started looking at alternative technology systems, including Lotus Notes-based systems.

Vogt then asked the advice of existing network maintenance partner Altair Computer Systems.

Due to Momentum's existing Microsoft technology base, and their desire for an integrated and tailored system, Derek Simpson from Altair recommended Microsoft Dynamics CRM.

"Microsoft Dynamics CRM is a flexible CRM solution that I knew we could tailor to work the way Momentum works, so that they could react faster to their clients' recruitment needs," Simpson says.

"We also liked the fact that Microsoft Dynamics CRM integrates well with Microsoft Office programmes, including Microsoft Office Outlook, Microsoft Office Word, Microsoft Office Excel, and has powerful data-sharing tools such as Microsoft SQL Server Reporting Services."

On presentation, Michelle Vogt could see that Microsoft Dynamics CRM's flexibility, intuitive nature and search capabilities would help the organisation immensely, and so it became the technology of choice.

Tailoring Microsoft Dynamics to Momentum's needs

Microsoft Dynamic's intuitive, web-based design tools enabled Altair to easily enhance the base CRM technology, and create a set of configurations and customisations to specifically suit the recruitment industry, creating Microsoft Dynamics CRM Recruit+.

"The Momentum and Altair CRM project team sat down and went through Momentum's recruitment process in detail, so we clearly understood their needs and could create the necessary search entities," says Simpson. "Then, the custom developments were done using Visual Studio 2005."

"For resume and CV searching, SQL Server Full Text Search capabilities were utilised, meaning staff would be able to use easy search strings, like Google uses, which are familiar to most internet users," he says.

"Additionally, as Momentum operates in dual locations, to enable fast browsing of resumes they are stored on servers in Auckland and Wellington and replicated using Windows 2003 Server File Replication services."

Business Situation

Momentum was looking for a smarter and more efficient way to manage recruits' CVs, so they could place people in the right job, faster.

Solution Summary

IT partner Altair Computer Systems, custom made an integrated CRM solution, based on Microsoft Dynamic CRM.

Value to Business

- Improved business insight
- Accurate and intuitive view of information held about job recruits
- Ease-of-use improves database searches
- Automated processes, increase workforce productivity and reduce human error and subjectivity
- Improved ability to react to customers' requests, improving customer service

Value to IT

- Built on modern/solid platform
- Scalable
- Reports can be run by consultants and managers freeing up IT and administration team to add value elsewhere

Microsoft Technology

- Microsoft Dynamics CRM
- Microsoft SQL Server 2005
- Microsoft Windows Server 2003
- Microsoft Visual Studio .NET 2005
- Microsoft .NET Framework 2.0
- Microsoft Office 2003 and 2007

Partner

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Derek Simpson says that Microsoft Dynamics' streamlined installation processes and improved troubleshooting tools, helped ensure Momentum could be up and operating fast—and stay that way.

"The development took about eight months, and after testing we went live in April 2007; successfully converting to Microsoft Dynamics CRM Recruit+ over a weekend," he says. "Since then, we have implemented some additions to the functionality and we expect this to continue over time as the business changes."

Instant impact

Beth Bryson, Momentum Management Team Executive Assistant, assisted in the project's rollout and internal training, and says the positive impact was instant.

"Microsoft Dynamics CRM is already saving us time, by reducing data entry and improving how we search," she says. "Job applications are being processed faster, so that consultants can see resumes quicker and put them forward to clients quicker."

"Other manual steps are also now automated," she says. "For example, if we were preparing a CV to send to a client, we used to have to manually insert a Momentum cover page with our logo. Now we only have to press one button and it is done automatically, saving another step in the process."

Bryson says that once you are up to speed with the new system, the steps to find a person's details are much more logical than they used to be.

"The steps to search for people make more sense now," she says. "If we want to find a Human Resources manager in Auckland with 10 years' experience, we now have the tools to easily find them. We can also drill down to find more detailed information, such as looking for people who want permanent or temporary work, what province they are in, and their salary range."

Michelle Vogt agrees that Microsoft Dynamics has had a positive impact.

"The new system is saving us time, and enabling us to process applications faster, while reducing human error," Vogt says. "We also wanted a system that was as objective as possible, and now we have that. Microsoft Dynamics CRM means that consultants are no longer having to waste time coding and processing the CVs for each of our potential recruits. Instead, they can be out there meeting clients and placing the right people in the right jobs, at the right time – which is now!"

"The Microsoft interface is also familiar to staff who already work well in other Microsoft applications, such as Microsoft Outlook," she says, "Consultants only need to login to Microsoft Outlook and they can access all their candidate, customer and recruitment information." "Emails and appointments recorded in Outlook can also be easily tracked in CRM," Vogt adds. "The integration with our other Microsoft technologies increases our efficiency, and in the future we are looking to integrate Microsoft Dynamics CRM with our existing Microsoft NAV financials system."