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Microsoft Business Solutions
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Grant & Eisenhofer Chooses ISS Group as Microsoft® Dynamics CRM Partner of Choice

Challenge

Grant & Eisenhofer P.A. (G&E) is a national litigation boutique that concentrates on federal securities and corporate governance litigation. G&E exclusively represents institutional investors, both public and private, who have been damaged by corporate fraud, greed and mismanagement. Based in Wilmington, Delaware and New York City, G&E routinely represents clients in federal and state courts throughout the country.

G&E wanted to structure its data in a more useful, user-friendly, and readily available format; allowing Microsoft Dynamics CRM (MSCRM) users to get the views/reports of the data they need. They also needed the ability to import 'raw' Standard & Poor (S&P) data from multiple and disparate S&P sources and retrieve contact information from disparate sources, such as Exchange, and based on a configurable rules-based workflow; share contacts and related information with other users.

Solution

- Re-implementation of existing Microsoft Dynamics CRM 3.0 Solution.
- Custom develop an import tool to retrieve - on a quarterly basis - raw S&P data from multiple S&P sources and post into MSCRM.
- Custom develop a user-configurable, rules-based tool to retrieve contact information from disparate systems, such as Exchange, which maps this information to a staging entity prior to posting into MSCRM.

Benefits

- Data is now structured in a more normalized fashion allowing the user to easily and readily access pertinent information in user-defined dashboards and reports.
- The custom developed import tool extracts the S&P data and distributes it into MSCRM entities and builds relationships not readily available in the raw S&P data. By merging data from multiple S&P sources, G&E can provide a global view of the data, obtaining a substantial competitive advantage of G&E.
- Using the new custom contact mapping function, contacts can then be reviewed, and based on G&E's rules-workflow, will get migrated into the standard MSCRM contacts entity with user-customizable mapping. The contacts can then be synchronized with other user's Exchange contacts. G&E has control over the users that will receive the contacts and the mapping to the Exchange contacts is user-customizable.