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# Aleron Improves Sales Processes and Alignment with IT Utilizing the Power of Microsoft Dynamics 365

## THE SITUATION

Aleron is comprised of a group of business process outsourcing companies with a focus on talent and workforce solutions. The organization's global footprint has helped to expand its solution line to traditional staffing, managed services, and IPO.

Aleron's mission is to "provide global business solutions focused on total talent, workforce management, and technology outsourcing."

To achieve this mission, Aleron previously used a custom CRM module within its applicant tracking system along manual process and other tools. This combination of different tools, while helpful as a starting point, was not a "true CRM," according to Frank Gullo, Chief Technology Officer at Aleron.

"Having different systems and manual processes while not having a solution that was built for sales provided many challenges," Gullo says. "The business case was to go to bid for a CRM."

To kick off its discovery process, the Aleron team formed a CRM selection committee to examine the most prominent CRM solutions on the market. Through an extensive evaluation and scoring process, the committee narrowed down its choices to the world's leading CRM systems: Salesforce and Microsoft Dynamics 365.

At the end of the process, Aleron selected Microsoft Dynamics 365 as its CRM of choice.

INDUSTRY: PROFESSIONAL SERVICES  
LOCATION: NEW YORK

## THE SOLUTION

"We had a multi-department team and sales-led project," Gullo says. "Ultimately, the CRM selection committee felt this was the best fit for our organization, especially considering our sizable investment in Microsoft solutions."

The company's former CIO and selection team had worked with a consulting partner prior to Ledgeview. While the partner provided help with the implementation and support thereafter, there came a time when the organization realized they needed a fresh perspective to meet their adapting needs.

Aleron found Ledgeview Partners through a referral from Microsoft in 2018.

The CRM deployment project was designed with ample complexity at first but scaled back as implementation day drew near.

Over the timeline of the project, there were many internal process changes at Aleron that led them to simplify Dynamics to improve usability and overall adoption rates.

"We approached this with full project support," Gullo says. "There was a change management process, and I think some of the challenges came with our original implementation partner, pre-Ledgeview. But since engaging Ledgeview, our CRM has grown into a steady-state and adoption continues to grow. Microsoft Dynamics 365 is a key tool used by our sales force."

## THE SOLUTION

Prior to implementing a new version of Microsoft Dynamics with Ledgeview, the majority of processes at Aleron were “very manual.” The team was most impressed by the integration capabilities of their new Dynamics interface and the Microsoft ecosystem, especially with Power Platform.

Gullo noted that during the implementation process, “We had a number of cases and the first load was kind of bumpy. However, we basically reimported and refreshed into a new version to clean everything up.”

While the team was surprised at how “challenging” the process of moving from one CRM system to another was, Gullo notes that “Ledgeview was very strong in this area and helped us.”

“Microsoft Dataverse makes it easy to manage data within our solution while implementing changes and updates as we go,” Gullo says. “On the sales side, the sales reporting and tracking capabilities have been very helpful, as well as from a sales management perspective.”

Sales and marketing departments use Microsoft Dynamics 365 at Aleron.

“Microsoft Dynamics 365 has given us great insight into the customer lifecycle,” Gullo says. “Marketing uses it as a key data source for their marketing automation platform. It funnels all campaigns and outreach as the source system, acting as a vital integration for their tool.”

Since implementing Microsoft Dynamics, the sales and IT teams at Aleron have become more aligned.

“Dynamics has built a greater relationship between IT and sales because IT supports the tool and allows us to work more closely with sales,” Gullo says. “It has helped us stay in touch with the sales process.”

Microsoft Dynamics 365 has given the team the ability to eliminate manual processes and provides a single source for data to be stored. It has helped Aleron cut down on the utilization of multiple email processes and prevents duplicated documentation.

“Microsoft Dynamics is one place for sales to go to get all of the information they need,” Gullo says.

Gullo says the team particularly benefits from Dynamics’ native features. As part of the Microsoft ecosystem, Dynamics enables Aleron to easily access and connect to other Microsoft products.

“We look forward to this availability as the promise the solution

offers,” Gullo says. “SharePoint, Microsoft Teams, Power Platform, LinkedIn – that’s where we see the promise of Dynamics as we continue to grow with it. How these platforms all work together is pretty intuitive.”

Gullo recommends Microsoft to organizations that are already using the Microsoft Office 365 Suite and are looking for a CRM solution to support their needs. He also recommends Ledgeview as a “key” Dynamics partner.

“We really appreciate the Ledgeview team. They’ve been a pleasure to work with and have supported our IT dept. and vision for growth. They’ve helped us find solutions that we weren’t able to find ourselves. Ledgeview has been a key Dynamics partner.”

**FRANK GULLO**

### About the Organization... in their own words:

“To discover the art of work is to learn about the ways in which people impact an organization. We know that managing the right talent and utilizing the right resources can help a business to flourish. As a global workforce and business solutions company and industry leader since 1957, Aleron specializes in ideating and creating total talent solutions, workforce management, IT services, and more.”

Learn more about Aleron at [www.aleroninc.com](http://www.aleroninc.com).

**Aleron**