



### Industry

- Healthcare Staffing Services

### Products

- Microsoft Dynamics CRM

### Challenge

AMN Healthcare's eight divisions were each using a different CRM program or method for tracking customer relationships. This hindered divisions from efficiently working together, resulting in high operating costs.

### Solution

Based on its cost-to-benefit ratio and rapid integration platform, AMN Healthcare chose Microsoft Dynamics CRM as the platform for replacing and consolidating its disparate divisional processes and technologies.

### Benefit

- Elimination of a costly software upgrade
- Centralized account data, visible across the company's multiple divisions
- The ability to cross-sell services throughout customer organizations
- Automation of labor-intensive, manual reporting process
- Increased sales productivity through real-time, remote access to customer information
- A reliable CRM platform that allows for future growth

## Integrated CRM System

AMN Healthcare Services, Inc. is the largest healthcare staffing business in the United States. AMN's gamut of professional healthcare services covers physician, nursing, imaging, therapy and pharmacy staffing, as well as workforce management and recruitment services. AMN Healthcare has fueled consistent, organic growth, with a good deal of that growth coming from the acquisition of competitors into new business divisions.

*Customer records were scattered individually across our organization, and there was no consistency in who was being called by each division. Now, there is a single set of data for each AMN customer; a single record, viewable by multiple divisions, that holds all of the customer account data in one central place.*

*Patrick Conerty,  
AMN Healthcare*



### The Challenge

AMN Healthcare's need to support a vast array of business systems across its divisions resulted in highly disparate sales and marketing support efforts throughout the organization. The company continued to improve its performance despite these obstacles, but it clearly saw areas for further improvement in key business systems, such as Customer Relationship Management.

Each division had a different method for tracking their sales efforts, including Goldmine and Excel spreadsheets. The company's CRM solutions were lacking in several key technical and business features, including true integration technology, enterprise reporting tools, and collaboration capabilities. With a

number of different customer tracking systems in place, customers would often receive sales calls from multiple salespeople, resulting in duplication of efforts and an inability to cross-sell customers on AMN Healthcare's wide array of services.

Recognizing the challenges that were facing the organization, AMN's executive team set out to find a solution that would provide all divisions with a centralized customer information repository and would help increase sales throughout the organization. While one of AMN's divisions was using GoldMine as their CRM solution, the system was not able to meet their needs as it did not allow for multiple divisions to see the same customer data, did not



## Integrated CRM System



### The Challenge (continued)

allow for integration or collaboration, and had no reporting functionality.

AMN Healthcare also evaluated several other Customer Relationship Management solutions, including Microsoft Dynamics CRM and Salesforce.com. In addition to evaluating the features of each CRM solution, AMN's executive team sought the best solution for establishing a business application platform as well as a means to integrate the disparate divisional systems and data.



### The Solution

AMN Healthcare chose Microsoft's Dynamics CRM as it would provide the best cost to benefit ratio and go the furthest to solve AMN's connectivity and integration challenges. Dynamics CRM immediately provided the proper tools and functionality needed by AMN's technical, executive, sales, marketing and customer service teams while also providing a proven platform for expansion throughout the organization in the delivery of lines of business systems.

Neudesic and AMN worked jointly together to ascertain succinct requirements and devise a plan for a six-week deployment. By capitalizing on the Microsoft Dynamics CRM Online offering, identifying critical success factors, ensuring stakeholder participation and end user buy-in, the total CRM solution, including complete end user training, was deployed within this escalated time frame and within the proposed budgetary guidelines. Once AMN was ready to bring the solution in-house, the Dynamics CRM

Online system was re-deployed to an On-Premise version and all end users re-deployed in one weekend.



### The Benefit

"We have been very happy with Microsoft's Dynamics CRM in general," said AMN Healthcare's Patrick Conerty. "While there were some initial acceptance challenges on the part of our team, it was not long before team members realized that the extreme benefits of Dynamics CRM far outweigh the up-front investment in the enterprise solution. Dynamics CRM standardized our processes and provided us with crucial reporting functionality that was sorely missing throughout the enterprise."

One of the most substantial benefits of AMN's new Dynamics CRM system is the ability to properly track sales team activity. The system provides clear insight into which sales team members are doing what, against which customers. There is no longer duplication of phone calls, appointments, emails, and overall sales efforts, greatly reducing the effort it takes to make a sale and improving the customer experience. Dynamics CRM has also provided AMN with the insight necessary to initiate and track touch point campaigns with different priority levels within customer organizations.

Prior to the deployment of Dynamics CRM, AMN Healthcare's sales team was unable to access their customer information remotely. They were unable to log meeting and call notes while they were out on the road selling. Dynamics CRM has brought everything online for the AMN sales team allowing

them to access their customer information from anywhere in the world. Sales team members get a clear, real time picture of their customers and management can better manage sales territories via the visibility into cross-sales activities. "Making sure you are touching all of your customers through CRM is very beneficial," said Conerty. "If you are not doing that, the system will tell you through its reports and auto-created activities."

AMN Healthcare's management has also greatly benefited from the sales reporting included with Dynamics CRM. They are better equipped to manage sales teams

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*Patrick Conerty,  
AMN Healthcare*

and ensure that they are generating leads, implementing marketing in an efficient and cost-effective manner, and meeting their sales goals. Once sales are made and contracts must be generated, the AMN contracts team now has visibility into customer information and can stage their contracts much more quickly.

Historically, sales and marketing email campaigns have been painstakingly slow for AMN. In many cases, members of the sales team were copying and pasting their messages into individual emails, and there was no tracking mechanism to determine which email marketing efforts were successful. With Dynamics CRM, the



## Integrated CRM System



### The Benefit (continued)

entire email marketing campaign process is automated with clear and concise tracking and consistent messaging, resulting in a vivid picture of which email marketing campaign efforts are providing returns. In addition, Dynamics CRM has provided AMN with the ability to track the lead sources of these marketing campaigns, giving them a clear picture of the campaigns that are producing the best return on investment.

Process standardization across divisions has also been addressed with the implementation of Microsoft Dynamics CRM. Dynamics CRM-based work flows have provided this standardization platform, increasing efficiency and reducing costs. A previously unidentified benefit has been AMN Healthcare's ability to target and recruit top talent. This added benefit helps drive their business while allowing the organization to further use Dynamics CRM to market to the customers that hire that top talent through their services.

Another critical benefit of the move to Dynamics CRM is the platform's ability to be expanded to meet future needs. Dynamics CRM offers the real-time visibility into sales efforts that will allow AMN sales team members across divisions to work together. "The ability to properly conduct cross-selling across our divisions is a huge benefit. An AMN physician staffing services rep will be able to check a prospect list in Dynamics CRM and see that one of our nursing services sales reps already has a meeting scheduled with the prospect for two weeks out," says Patrick Conerty. "Rather than

calling the potential customer, duplicating efforts, and possibly alienating the customer, the physician staffing rep can simply ask to piggyback on the nursing rep's meeting. This not only reduces our efforts, but better respects the time of our customers."

As part of Dynamics CRM's ability to be expanded easily, AMN Healthcare can quickly add new divisions to the existing system and do so at a fraction of the cost it would take to build additional platforms. Not investing further in GoldMine saved AMN over \$50,000 and they were able to apply that savings to their deployment of Dynamics CRM. The new system has also resulted in a vast improvement in customer data quality and system integration throughout the organization. "We are pretty agile now, and that is great," says Conerty.