



## Microsoft Dynamics Customer and Partner Solution Brief



**Customer:** Corefino Services, LLC

**Web Site:** <http://www.corefino.com/>

**Customer Size:**

**Country or Region:** United States

**Industry:** Financial Services

**Partner:** Workopia

### Customer Profile

Corefino is a privately held financial outsourcing company based in San Mateo, California. Corefino has a history of innovation in providing outsourced accounting solutions based on software-as-a-service (SaaS) to their customers.

### Software and Services

- Microsoft Dynamics CRM

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[members.microsoft.com/customerevidence](http://members.microsoft.com/customerevidence)

## Corefino

“With Microsoft Dynamics CRM Online, we can see everything across any time. From a visibility and transparency standpoint, that’s huge!”

Karen Watts, CEO, Corefino Services, LLC

### Business Needs

Corefino is a privately held financial outsourcing company based in San Mateo, California. Corefino has a history of innovation in providing outsourced accounting solutions based on software-as-a-service (SaaS) to their customers. So when Corefino moved to implement a customer relationship management (CRM) solution, it was natural to look online. CEO Karen Watts says, “Our customers are all in the cloud, so we were very interested in having that kind of solution.”

Watts insisted that the company do a full evaluation of SaaS-based CRM applications, including Microsoft Dynamics® CRM Online and Salesforce.com. The ability to measure and track performance was of particular importance, according to Watts: “It was essential to have reports, dashboards, and to be able to track results for sales and marketing.” Microsoft Dynamics CRM Online emerged from the evaluation process as the

clear winner. Watts says, “It was unanimous. Everyone chose Microsoft.”

### Solution

Corefino now uses Microsoft Dynamics CRM Online through its sales and marketing processes, resulting in much greater visibility and transparency. They are able to plan and initiate campaigns within Microsoft Dynamics CRM Online and track customers through the sales process and beyond. Corefino’s Microsoft partner, Workopia, was very helpful throughout the process and demonstrated the necessary experience, expertise, and understanding of Corefino’s business to help achieve a successful implementation.

### Benefits

With Microsoft Dynamics CRM Online, Corefino has been able to drastically improve visibility into sales and marketing processes. The streamlined user interface was an added bonus, making sales and marketing tasks easier to complete. Watts explains, “We’re

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able to get all the metrics quickly. So if we run a marketing campaign we are able to see in a few clicks how long it's taking to close those leads.”

Another significant benefit comes in the form of tighter execution of sales and marketing activities. “Our product is workflow-driven,” says Watts, “now the sales and marketing team is joined into that workflow. We’re able to constantly add value through a continuous improvement process.” Corefino plans to expand their CRM implementation to include customer service with the release of Microsoft Dynamics CRM 2011.

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