



THE MIKE FERRY ORGANIZATION



## CLIENT BACKGROUND

The Mike Ferry Organization (MFO) provides coaching, seminars and audio/video training products to improve the productivity, profitability, and lifestyle of its real estate clients. The MFO philosophy is to invest in products and services that provide tangible benefits to those same clients.

By producing innovative training seminars, using proven products to support those seminars as well as other ancillary programs which support real estate agents, the Mike Ferry Organization enhances the ability of any agent to be more productive and highly profitable. For over 35 years, thousands of agents nationwide have succeeded using the Mike Ferry Program.

## BUSINESS CHALLENGE

It follows that MFO needed to update its technology to better serve its clients and coaches. MFO schedules and sells speaking engagements, training events and individual coaching sessions. To successfully manage such activities, it is essential to have an efficient system that can keep track of all related prospecting, selling, payment, and attendance activities, by event and by client.

As MFO grew, its contact management system proved to be limited and required manual processes to integrate with an outdated accounting package. MFO had limited visibility when trying to efficiently manage client accounts, event attendance, coaching activities, or credit card payments. Delays in the billing process occurred on a regular basis with thousands of contracts being produced manually each month. In addition, credit card information took one to two days per month to process, while employees walked paper forms between various offices.

MFO's Executive team realized the critical need for a capable Customer Relationship Management (CRM) system that easily integrated with a robust ERP system for seamless sales and accounting operations to support future growth. It was recognized that reporting also needed to be improved so that both sales and accounting activities would be visible and easy to analyze.



## BUSINESS SOLUTION

For effective and comprehensive business management, the Executive team required that all business activity flow through CRM, and that the new accounting system better assist MFO's business processes and environment.

After interviewing several firms, MFO selected FMT Consultants, LLC (FMT) to design, install and support Microsoft Dynamics GP followed by Microsoft Dynamics CRM to replace its older business management systems. FMT knew from the start that the Microsoft CRM solution had to be fully integrated with Dynamics GP, and also work well with other Microsoft authorized third-party software.

FMT began by meeting with MFO to determine specific business requirements and understand current processes. To ensure successful project management and system installation, FMT utilizes the Microsoft Sure Step Process which includes: diagnosis, analysis, design, development, deployment, operation, and optimization. The project plan included analysis of requirements and targeted solutions with a focus on providing a robust billing process and an accurate, easy method of tracking event rosters.

Bryce Sainsbury, Director of Information Technology for MFO, states: "It was impressive how FMT scoped out the entire project in detail, created a realistic project plan, and kept the project moving forward. When there was an occasional, unforeseen challenge, FMT assigned the appropriate resources immediately and got things moving again without jeopardizing the integrity of the project."

In April of 2007, the project successfully went live. Mr. Sainsbury had heard from colleagues that going live could be a nightmare. However, according to Mr. Sainsbury, the entire FMT team worked proactively to provide needed customization within budget and within industry standards, resulting in a smooth migration.

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**"We were impressed that we could literally turn off one system then turn on the new one, and keep going without having to go back to make significant changes."**

**Bryce Sainsbury,**  
**Director of Information Technology for The Mike Ferry Organization**

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Following the Microsoft Dynamics GP implementation was the Microsoft CRM project. Seven years of history from their legacy Goldmine CRM application needed to be migrated to Microsoft CRM as a result of MFO's loyal client base. Additional applications were purchased or developed that provide automatic dialing, as well as customized reports and more specifically, ensured that online credit card transactions were immediate, secure, and had the proper encryption policies in place.

FMT ensured consistency throughout both implementations by maintaining a solid team of Microsoft Certified professionals from analysis to deployment, as well as support which continues today.



## BENEFITS

MFO has experienced transformative benefits with its CRM-driven approach to business and, in particular, with its new systems that supports this strategy. Here are some of the benefits MFO has reported:

- With FMT's Microsoft CRM solution, the sales team has its own dashboard enabling sales directors to proactively manage sales productivity and bonuses.
- The ability to track email communications with its customers in one centralized solution
- With the integration of CRM and GP, coupled with SQL reporting services, client coaching reports and commissions are produced, saving more than 20 hours/month of accounting time.
- With automated event rosters, credit card payments and invoicing, accounts are settled quicker and cash flow is maximized.

One more extraordinary benefit, according to Mr. Sainsbury, is the lasting and productive relationship between MFO and FMT. FMT has been a trusted advisor and trainer throughout the entire process, resulting in a depth of knowledge that leads to great achievements for MFO and its clients.

## CUSTOMER DETAILS

The Mike Ferry Organization  
7220 S. Cimarron Road, 3rd Floor  
Las Vegas, NV 89113

Phone: (800) 448-0647

Fax: (702) 982-6265

Web site: [www.mikeferry.com](http://www.mikeferry.com)

## SOFTWARE & SERVICES

Microsoft Dynamics GP

Microsoft Dynamics CRM

Microsoft SQL

Microsoft Exchange

Scribe Insight

## FMT BACKGROUND & METHODOLOGY

FMT Consultants, LLC is Microsoft's leading Southern California provider of integrated business solutions and information technology services. Since 1995, its experienced team of consultants has leveraged the Microsoft technology platforms, including Microsoft Dynamics GP, Dynamics CRM, SharePoint, Exchange, Office and Microsoft SQL, to provide companies with innovative solutions to their most challenging issues.

As an award-winning Microsoft Gold Certified Partner, FMT works with companies to architect and deliver high-quality, affordable technology solutions that help them run their businesses better. FMT's expertise includes analyzing, designing, implementing, developing and integrating multiple software and hardware systems, as necessary, to optimize clientele's business processes and achieve their goals. In addition to doing project-based work, FMT provides support services for numerous clients in a variety of industries in order to assist them with their ongoing, day-to-day solution needs.

FMT serves its clients nationwide with a regional focus on Southern California including San Diego, Los Angeles, Riverside and Orange Counties.

## NEED MORE INFORMATION

<http://www.FMTconsultants.com/>



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