



**LUXOR**  
SIMPLY CRM.ONLINE

## Customer Case Study



### Marts & Lundy

Marts & Lundy is a New Jersey-based philanthropic consulting firm that has been serving the not-for-profit community since 1926. With an international client base of numerous healthcare organizations, universities and colleges, cultural organizations, and many other institutions, Marts & Lundy is the recognized leader in helping clients to build a “culture of philanthropy”. The firm provides experienced consultants to counsel clients of all sizes in fundraising fundamentals. The staff members have on average 25 years of experience in working in philanthropy and ten years of experience with the firm. Services offered include: advancement counsel, assessments/studies, campaign counsel, gift planning, strategic communications, and training seminars.

### The Challenge

With an established reputation and 80+ years in the business, Mart and Lundy has a very large and diverse customer base. The business needed a system to track customers and associated billings and expenses; prior to implementing Luxor CRM, everything was done by hand – expenses and billings, checks and balances, entry into the general ledger, etc. Field consultants prepared their expense reports manually and forwarded them to finance; finance checked and coded the reports, and inputted the expenses in the general ledger. The process was long and tedious, and closing accounts took on average three days. Given the size of the organization and volume of customers, Marts and Lundy needed a more efficient way to keep track of billings to expedite the process of closing the books.

### CRM Project Scope

**Industry:**

Philanthropic consulting

**Number of Luxor CRM Users:**

86

**Timeframe for Implementation:**

< 5 days

**Benefits of Luxor CRM:**

- ❖ No annual contract
- ❖ Fast and affordable deployment
- ❖ Extremely flexible and customizable
- ❖ Integration with other software

## The Solution: Luxor CRM

Marts & Lundy needed a system to track consultants in the field and the associated expenses and billings. Luxor CRM allows users to record all information associated with leads, contacts, and opportunities, and generate reports from the data, so it was a perfect fit for the firm's requirements. It is also very easily customized to meet the needs of the individual business. "Luxor CRM was really great because it was so flexible; it was very easily drafted and tweaked to meet our needs," says Marts & Lundy Vice President and Chief Financial Officer Robert Miskura when explaining why they chose the application.

As a web-based solution, Luxor CRM requires no investment in hardware or any other infrastructure and thus has a very quick implementation process. Designed to mimic a desktop application, it is very intuitive and requires minimal training. With a simple Internet connection and only a few hours of training, Marts & Lundy was able to fully deploy Luxor CRM in under a week. According to Miskura, "There was almost no downtime in getting Luxor up and running, and the system was very easy to use. The familiarity of the product was great -where to input what information, who could control which settings, etc. The system is very user-friendly."

*"Luxor CRM met our needs perfectly, and was so easy to use and integrate with other applications. Processes that used to take days are now completed with the press of a button."*

- Robert Miskura  
VP and Chief Financial Officer  
Marts & Lundy

## The Results

Following the implementation of Luxor CRM, the finance department at Marts & Lundy was able to bring the time for closing its books down from three days to just one. Users are now able to generate billings and expense reports by opportunity, streamlining the process of developing expense reports and inputting data into the general ledger. Consultants enter the time spent in the field associated with each opportunity (customer) and the number of days to be billed, and then all finance has to do is check things over. Integrating Luxor CRM with Microsoft Dynamics Accounting, a recommendation made by the executives at Luxor and adopted by Marts & Lundy, further streamlined the process. In dealing with Luxor staff, Miskura says he has the "utmost respect for the [Luxor CRM] team. The executives are amazing, their advice is terrific, and they have never misled us. This is one of the best client-supplier relationships we've had".

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