

Geo Plans for Customer Service Improvements Pay off with CRM



Background

Specialists in the supply of information linked to postcode or location, Geoplan www.geoplan.com offers a wide range of products and services to its customers, from laminated maps to directories, databases and highly sophisticated bespoke mapping software systems.

Its customers can use this information to support their sales, marketing, operations and distribution activities.

The Salvation Army, for example, uses Geoplan products to obtain the vital information it needs on postcode sectors and geographic locations to more efficiently plan clothing collections (donations to charity by the public) for their clothing collectors, taking into consideration agreed collection times and geographic location of clothing and collector.

Other customers include: Dyno-Rod, Whitbread and Molly Maid.

Problem

In the past, Geoplan had a customer accounts & marketing database to hold customers details, plus **multiple** in-house systems and Sage accounting software for accounts and invoicing purposes. Disparate systems and silos of data made it difficult to consolidate customer information and **prevented its 28** accounts, support and sales employees from collaborating and servicing customers effectively.

Geoplan also lacked the ability to record and log **sales made via the web** in its database or other systems - staff did not have a complete view of customer purchases.

Geoplan's customers occasionally had to share support files with Geoplan's support staff. Geoplan did not have a simple, quick way for customers to share support files (in the past, this was completed using an inefficient FTP site) and, equally, support staff did not have

a simple, quick way of accessing and working on those files.

Geoplan's accounts staff and Finance Director also lacked the systems and processes to provide an 'easy to access', **complete management level view of business.**

Solution

In 2006, Geoplan chose to deploy Microsoft Dynamics CRM version 3.0 across its UK business, deployed and customised by CRM consultant & Microsoft Gold partner Optevia Ltd.

Microsoft Dynamics CRM is a generic CRM application that operates just like Microsoft Office; it can be accessed through Microsoft Outlook, Internet Explorer and Windows Mobile.

Optevia deployed the Microsoft Dynamics CRM in just a few weeks.

It also successfully migrated **60,000 invoices & sales records and 25,000 customer accounts** from the existing customer accounts & marketing database and disparate in-house systems, to the new CRM system.

To enable Geoplan to better manage web-based sales orders and, to obtain a complete view of customer purchases, Optevia integrated the CRM system into the web sales process. Orders now pass seamlessly between the website, website payment engine (provided by WorldPay) and into the CRM before reaching Sage for billing purposes.

Similarly, Optevia also completed an additional project to enable Geoplan to better manage customer service and support requests. Customers can now simply log-in to the Geoplan website, access a secure log-in page, enter their user name, email address and password (which is validated by the CRM system) and then upload files for support staff to access. All support files are 'deposited' into the appropriate customer account.

At a Glance

CRM consultant & Microsoft Gold partner, Optevia Ltd:

- rapidly deploys and customises a new, enterprise wide Microsoft Dynamics™ CRM replacing an existing customer accounts & marketing database and multiple disparate inhouse systems for supporting customers
- integrates Microsoft Dynamics CRM with existing Sage accounting software
- painlessly migrates 60,000 historical invoices & sales records and 25,000 customer accounts into the CRM system
- enables sales and support staff to access a single system to receive a complete view of the customer - from initial purchase to delivery, billing and after sales support - improving quality of service
- completes five separate CRM customisation projects to equip Geoplan with the specific tools it needs to more efficiently and effectively run the business and serve its customers

Staff can open the CRM system; access a customer account, such as *The Salvation Army*, and view and work on a list of support files specific to that customer.

In order to provide account staff and the Finance Director with a management level view of business operations, Optevia built a time sheet application – integrated with the CRM system. This replaces an inefficient process of staff adding time / activity details to a Microsoft Outlook style calendar. In addition, Optevia also integrated Microsoft Dynamics CRM Service Calendar which enables accounts staff to manage and monitor staff resources, time, due date of projects etc. and match that to staff time sheets. Collectively, this is providing accounts staff with a more in-depth, more useful view of the business.

Plus, Optevia built an integrated dashboard application to enable the Finance Director to receive a complete view of the company's performance. Delivering a 'traffic light' measurement system against Key Performance Indicators – such as sales, leads and support cases – the Finance Director can now measure company performance day by day. For example, looking at the company profit 'traffic light', a red light might indicate the company is making a loss; amber, breaking even, and green, making a profit. Lastly, Optevia has recently built a new HTML email campaign tool which enables Geoplan to email prospects using HTML based emails, all sent and tracked via the CRM system.

Value add services

Optevia provided Geoplan's staff with supporting documentation to help them better understand and use the CRM system.

In addition, in the first instance, Optevia provided face-to-face training, on a train the trainer basis, followed by on-going training to help staff understand and use the customisation elements of the CRM system.

Results

"Optevia's Microsoft Dynamics CRM deployment has enabled us to consolidate a database and other systems to receive a complete view of our customers," says Sara McCartney, Finance Director, Geoplan. "We can now also better support customers; better track and service web orders and receive a better, more useful view of the business."

Future

In the future, Optevia will continue to make enhancements to the interaction between Geoplan's website and the CRM system. For example, Geoplan will allow customers to submit support requests (not just support files) via the website which Optevia will integrate with the CRM system.

About Geoplan

At Geoplan we deliver world class geographic information solutions that will improve your business' performance. Combining creativity and a drive to get things done, our approach provides clarity, quality, reliability and consistency throughout. Performance improvement is achieved through effective resource deployment.

Using your data coupled with market and competitor information, trends, gaps and overlaps in your current business model are identified automatically. Our product range includes maps and directories, databases, mapping software, consultancy and bespoke solutions. Their primary application is in Sales, Marketing, After Sales and Distribution applications, across a broad range of industry sectors. Working alongside Royal Mail and Ordnance Survey ensures that our products are the most accurate, reliable and trusted on the market today.

About Optevia

Since helping launch Microsoft Dynamics CRM, Optevia is now Microsoft's premier Dynamics CRM public sector partner focusing on government agencies, local authorities, regulators, fire & rescue services, and licensing & grant organisations, including regional development agencies.

Optevia has a range of Dynamics CRM Essentials software products which reduce the cost and timeframe for delivering CRM solutions. The range includes value-add services, which ensure end-user adoption, post implementation support, and return on investment in Dynamics CRM.

Completing over 60 Dynamics CRM deployments, customers include:

Kent County Council, Local Government Association, The Pensions Regulator, Ofsted, The Arts Council, The London Development Agency, Kent Fire & Rescue Service and The Forensic Science Service. www.optevia.com

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