

London Development Agency Uses CRM to Boost Stakeholder Relations

Optevia



LONDON
DEVELOPMENT
AGENCY

At a Glance

- rapidly deploys and customises a new, enterprise wide Microsoft Dynamics™ CRM system replacing a multitude of legacy systems, spreadsheets and Microsoft Access™ databases
- helps to cleanse and de-duplicate stakeholder and organisation contacts
- creates a single, agency-wide source of stakeholder contacts, appointments, and a history of engagement
- completes a number of CRM customisation projects to equip the London Development
- Agency (LDA) with the specific tools it needs to more efficiently and effectively run the LDA
- enables the LDA to have a more collaborative and visible approach to its interactions with stakeholders

Background

The London Development Agency (LDA) is the Mayor of London's agency responsible for driving London's sustainable economic growth - it's the Agency's job to ensure that London remains a global success story.

The London Development Agency aims to improve the quality of life for all Londoners - working to create jobs, develop skills and promote economic growth.

The Agency achieves its aims by working closely with its stakeholders (those individuals, organisations and groups that have a 'stake' in London, such as London Boroughs, Developers, Learning and Skills Council, central government, the third sector and big businesses like KPMG, PWC and SERCO.

Challenge

In order to track, manage and follow-up contact with stakeholders, the LDA's staff (those staff who engage externally with stakeholders, project managers and other teams which look after the LDA's contracts) used to operate a multitude of systems and spreadsheets:

1. **A contact management system** was in place to manage corporate data, but it was not accessible agency-wide
2. Most commonly, staff used **Microsoft Excel-based spreadsheets** to independently store stakeholders' contacts
3. Some staff had developed their own **Microsoft Access-based systems** to store and manage contacts

Ultimately, it meant that the LDA was unable to effectively store and share stakeholder contact details across the organisation; it was unable to track contact made, monitor and follow-up contact with stakeholders; staff and teams worked in silos using their own data; and, for stakeholders, it could lead to an unstructured interaction with the LDA.

Solution

In April 2007, the LDA chose to deploy Microsoft Dynamics CRM version 3.0 across the Agency, integrated, configured and customised by public sector CRM consultant & Microsoft Gold partner Optevia Ltd.

Optevia rapidly deployed the initial CRM version 3.0 ensuring it was 'up and running' on every relevant PC.

In April 2009, the CRM system was upgraded by Optevia to **Microsoft Dynamics CRM version 4.0**.

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. Taking an 'out-of-the-box' CRM, Optevia has **customised** it to:

- create a bespoke application that fits the LDA's specific requirements (for example the CRM offers the ability to track the contacts and area's of key interest for stakeholders, local government contacts and the major's office)
- Incorporate a workflow to enable the tracking of Freedom of Information (FOI) requests. The workflow enables the LDA to track who submitted an FOI request; it enables the LDA to track the request; it can monitor who is handling the request; send an email to chase the staff member handling the request, track the FOI to ensure it was responded to in-time and make information available for reporting purposes
- Integrate essential data from provider Capscan relevant to each stakeholder, data such as address details, Borough's, constituency, local MP, etc.

Value-add services

Optevia has also helped the LDA to cleanse its existing contacts data and remove duplications; it helped to 'train the trainer' so that the LDA could manage its own staff training on the system in-house and it provides front-line support for the elements of the system that it has customised. Microsoft handles maintenance of the core CRM application.

Benefits

Now in use across the LDA, its staff use the CRM system for three main purposes:

1. **Contact management** – staff use the CRM system to track engagement with stakeholder contacts. Staff can view the latest contact with a stakeholder (made via email, telephone or post), view correspondence including a history of all activity (made within the last 7-days, a month or six months), and monitor key activities still on-going (such as calls not resolved).
2. **Track appointments** – the system uses a central calendar facility to assist staff in scheduling appointments and to enable closer monitoring of engagements with stakeholders.
3. **Business Intelligence** – the LDA is now using the data contained within its CRM system to proactively manage its stakeholder engagement; to identify which stakeholders it needs to focus on; to identify the last person to have contact with a stakeholder; and to develop marketing strategies for its engagement.

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Results

The LDA now has a single, **agency-wide source** of stakeholder contacts, appointments, and a history of engagement.

The LDA has a more **collaborative and visible approach** to its interactions with stakeholders.

Accessible to all of the LDA's staff, use of the system currently stands at an **impressive 72 per cent** (as of December 2008). This is an increase from just 8 per cent when the system was first deployed and follows a significant effort to embed the CRM, encouraging and training staff in how to use it.

The system now holds approximately **14,000 core stakeholder contact records and 7,000 organisation records**; this is reduced down from 20-30,000 contacts initially and follows a significant programme of consolidation and de-duplication of contacts.

"Our engagements with stakeholders are more visible and professional across the entire organisation," says Ciara Dingle, Stakeholder Communications Manager, London Development Agency. "For our stakeholders, they have more professional contact with us and less replication – overall the solution provides the agency with better visibility, insight, knowledge of its stakeholders and the relationships and touch-points that exist."

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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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