

Jones Lang LaSalle – The Devil Is In The Data

Optevia's CRM Services add Strong Foundations to Jones Lang LaSalle's Award Winning CRM Roll-Out



Real value in a changing world

At a Glance

CRM consultant & Microsoft Gold partner, Optevia Ltd:

- **is rapidly and efficiently training approximately 1000 staff from across Jones Lang LaSalle's EMEA offices to use a new, enterprise-wide, global Microsoft Dynamics™ CRM system for sales and contact management**
- **has already completed the training of 350 staff working in ten countries**
- **is rapidly and efficiently processing and cleansing Jones Lang LaSalle's existing sales and contact data and preparing it for submission to the new Microsoft Dynamics CRM**
- **has already processed and cleansed 100,000 contacts from eleven EMEA countries**
- **Optevia's value-add training and data analysis services helps Jones Lang LaSalle win Microsoft's Excellence in Multinational Implementation award**

Background

Jones Lang LaSalle is a financial and professional services firm specialising in real estate services and investment management. It employs more than 30,000 people in 750 locations in 60 countries.

In the past, the firm's staff in the EMEA region have used many different customer contact tools across different markets, ranging from Salesforce.com, spreadsheets, Lotus Notes, and ACT!. Silos of data made it difficult to share customer information and prevented employees from collaborating effectively.

In 2005, the company chose to deploy Microsoft Dynamics™ CRM across its global enterprise (initially version 3.0 and latterly, in 2008, version 4.0).

Problem

Because of the implementation's large scope and size, Jones Lang LaSalle was committed to an ongoing training process that helps employees learn Microsoft Dynamics CRM. It was also committed to ensuring that data from all legacy sales and contact management systems from across the globe – from multiple teams, countries and regions – was rapidly and painlessly cleansed, de-duplicated and integrated into the new enterprise-wide CRM.

In the EMEA region, to support the training and data analysis function, Jones Lang LaSalle wanted to partner with a firm that could demonstrate local presence, deep technical knowledge of Microsoft Dynamics CRM; proven CRM training and data analysis skills and have the resources available at short notice, and for an extended period of time.

Solution

Jones Lang LaSalle chose CRM specialist and Microsoft gold partner Optevia Ltd to help deliver its staff training and data analysis requirements in the EMEA region.

Training

Working from country-to-country, Optevia is training Jones Lang LaSalle's professional, customer facing staff.

The first introductory training session on Microsoft Dynamics CRM is aimed at getting staff using the system as quickly as possible; Optevia uses Microsoft Office PowerPoint 2007 based training presentations and demonstrations supported by training guides and quick reference handouts which have been developed in consultation with the central business team at Jones Lang LaSalle. The training covers the key features of Microsoft Dynamics CRM such as accessing and using the contacts, accounts, organisations, etc. and how to track emails and meetings from Microsoft Office Outlook 2007.

Second, for refresher training and, for additional training following the upgrade of the Microsoft Dynamics CRM implementation to version 4.0, Optevia is providing 'virtual' training, via Microsoft Office Live Meeting 2007.

Microsoft Office Live Meeting 2007 enables Optevia to schedule an online meeting with a number of Jones Lang LaSalle's staff at the same time - deliver a presentation live via the web and interact with participants via conference call and instant messenger.

Data analysis

To ensure that all staff experience a positive transition to the new Microsoft Dynamics CRM, Optevia is also responsible for the migration, processing and cleansing of Jones Lang LaSalle's existing EMEA sales and contact data into the new Microsoft Dynamics CRM.

Generally arriving in Microsoft Office Excel spreadsheets, collective data from individual teams or whole countries can include: contacts, accounts, opportunities, business lines, properties, Jones Lang LaSalle contacts (i.e. which member of staff has a relationship with whom) and notes (i.e. text attached to a specific contact).

Optevia is responsible for activities such as de-duplicating contacts within the same spreadsheet, correcting contact details and internationalising telephone numbers.

By using Microsoft SharePoint Server 2007, Optevia also securely saves the spreadsheet online and shares it with its U.S counterparts which submit the spreadsheet to the Microsoft Dynamics CRM to look for duplicates between the cleansed spreadsheet and contacts already in the system.

Based on the 'fall out report' from the Microsoft Dynamics CRM, Optevia will then work with local teams to remove any further duplicates from the spreadsheet before its data is finally sent into production on the Microsoft Dynamics CRM.

"Optevia's value-add CRM services are enabling us to switch our EMEA staff from their old sales and contact management systems to the new enterprise-wide Microsoft Dynamics CRM," says Gudrun Palmer, CRM Consultant, Jones Lang LaSalle. "The value this brings should not be underestimated; our staff have been using their local sales and contact management systems for a very long time so it was important to remove as many barriers to adoption as possible in advance of the roll-out and ensure the switch to the new system was rapid and painless.

It is equally important to not underestimate the scale of the data analysis role that Optevia has undertaken - it is perhaps clichéd to say, but in this instance the devil really is in the data. The firm had lots of data held in different formats, different locations with multiple duplications."

Results

Optevia is rapidly and efficiently delivering the training programme to approximately 1000 staff from across Jones Lang LaSalle's EMEA offices to use the new Microsoft Dynamics CRM.

It has already completed the training of 350 staff, working in ten countries (England, Scotland, Czech Republic, Finland, Hungary, Poland, Romania, Spain, Sweden and U.A.E).

Using Optevia's CRM training services, staff are trained quickly and efficiently.

Optevia has already processed and cleansed 100,000 contacts from eleven EMEA countries (England, Bulgaria, Czech Republic, Poland, Portugal, Romania, Russia, Spain, Sweden and the U.A.E).

Using Optevia's CRM data analysis services, sales and contact data is processed quickly and efficiently.

Optevia's value-add training and data analysis services have also contributed to Jones Lang LaSalle winning Microsoft's Excellence in Multinational Implementation award. This award recognises a customer that has achieved extraordinary success in the implementation of their Microsoft business management solution across multiple countries, currencies, and business processes.

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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