

United Kingdom Local Authorities' Body Streamlines View of Customers and Improves Services

"The Microsoft Dynamics CRM was a third cheaper — a savings of £300,000 (U.S. \$567,000). And we liked the Microsoft Outlook integration. Plus, of course, all the requirements were met...." **Paul Bray, Head of IT, Local Government Association**



The Local Government Association (LGA) represents the local authorities of England and Wales — some 450 bodies in total. It acts as a lobbying organisation on their behalf, organises conferences, publishes a range of publications, and provides an enquiry service. Over time, dozens of islands of information had grown up built around different technologies, which made it increasingly difficult for anyone to get a full picture of the LGA's activities. Because the LGA's legacy systems could not communicate with each other, it was decided to consolidate all the contacts and their related activities into a single system making it accessible to everyone in the organisation. To do so, the LGA's IT infrastructure was significantly upgraded and a fully integrated Microsoft® Dynamics™ CRM with third-party add-ons was introduced.

Overview

Country: United Kingdom
Industry: Public Sector

Customer Profile

The Local Government Association represents the local authorities of England and Wales. It acts as a lobbying organisation on their behalf, publishes a range of publications, and provides an enquiry service.

Business Situation

The LGA wanted to combine a large number of disparate contact databases into one in order to improve and speed up communication both inside and outside the organisation.

Solution

An infrastructure upgrade to Microsoft® Windows Server® 2003 and Exchange Server 2003 allowed a Microsoft Dynamics™ CRM with third-party add-ons to be introduced, delivering savings and improving the information use.

Benefits

- £300,000 (U.S. \$567,000) saved through new system
- Improves customer service
- Saves administration and IT time
- Reduces overheads
- Caters for future expansion

Situation

The Local Government Association (LGA) found itself with dozens of different, unlinked, contact databases and a variety of systems to support conference management and sponsorship, publications sales, enquiry handling, and diary management. Since the organization's main focus is to provide support and to lobby for its large number of clients it became increasingly important to consolidate them in one place.

Many of the same names appeared in different databases, sometimes for the same organisation, sometimes as representatives of different organisations. The data in some databases was also out of date and there were a range of different technologies in use, making the job of consolidation all the harder.

As well as a member database, there was a separate conference and events database, an accounting database, two other main databases, and then around 70 individual databases held by individual staff in Microsoft® Excel and Microsoft Access files. With 220 staff due to use the new all-in-one database, all with slightly different needs, it was imperative that the system introduced was flexible, easy-to-use, and robust.

The LGA put the contract out to tender along with a range of requirements. Paul Bray, Head of IT, LGA explains, "One requirement was that it was an open solution. The product had to have

the ability to be customized, and to be added to." The LGA is hoping to expand its events and publications business, and wanted the new system to be able to take whatever form of expansion was needed in the future. It was also felt that connecting the CRM system to its accounting software would be a big advantage (so, for example, invoices can be raised from orders placed through the contact system).

Other important considerations were how easy the finished solution was to use and, of course, how much the system would cost.

Four of the five original companies that expressed interest subsequently dropped out, leaving only a Pivotal system. But at the last minute, Microsoft Dynamics™ CRM specialist Optevia heard about the tender and decided to bid. "We only had about a week to 10 days to submit our Microsoft CRM, but LGA selected us," explained Peter Lynch, Project Manager, Optevia.

Solution

The solution put forward by Optevia and chosen by the LGA was a Microsoft CRM system with a few third-party add-ons to cater for its specific needs. However, before it could be installed, the association's infrastructure needed to be upgraded from Microsoft Windows NT® operating system version 4.0 and Microsoft Exchange Server 5.5 to the Micro-

soft Windows Server® 2003 operating system and Microsoft Exchange Server 2003 respectively. Windows Server 2003 and Exchange Server 2003 are part of Microsoft Windows Server System™ integrated server software.

“We were planning to move to [Microsoft] Windows [Server] 2003 anyway and somewhat later to [Microsoft] Exchange [Server] 2003.” said Bray. But the need for the CRM software pushed the move through earlier. The LGA chose Microsoft Gold Certified partner Phoenix Software to oversee the upgrade.

Richard Heaton, Software Consultant, Phoenix Software, explains, “We put it in a placeholder domain so network resources could be shared across the organisation, upgraded the Exchange server, integrated Microsoft Active Directory® and introduced remote control services to prepare the system for the Microsoft CRM introduction. At the same time we realised we needed to offer a CRM service for this growth market, for future roll-outs.”

With the infrastructure in place, Optevia began migrating all the data and integrating other systems with the Microsoft CRM system. “It took seven months, and there was a huge amount of integration, but the system went live in mid October — on schedule, on budget — and so far everyone is happy with how it has gone.” Lynch said.

As for why Optevia and Microsoft CRM were chosen over the Pivotal system, both Bray and Lynch gave the same answers. “It integrated well with other Microsoft software, and it was an open solution, whereas the others were quite closed. Users took to it as well. And it was very cost effective,” Bray explained.

Bray concurred, “The Microsoft CRM was a third cheaper — a savings of £300,000 (U.S.\$570,000). And we liked the Microsoft Outlook® integration. Plus, of course, all the requirements were met — including the potential for future integration.”

The openness of the system was demonstrated when Optevia implemented a third-party add-on, Axonom’s Powertrak, a verified Microsoft CRM independent software vendor solution, to achieve something not included in the basic Microsoft CRM installation. Lynch explained, “Powertrak provides us with three key benefits. First, it enables the system to represent complex relationships, for example, between a contact and several organisations in different

capacities. Second, Powertrak offers a customizable Conference Management add-in to Microsoft CRM. Third, it provides a toolkit to develop custom functionality specific to LGA, in effect an entirely new module tightly integrated with Microsoft CRM.” Optevia also used Scribe’s Insight for Microsoft CRM, another verified Microsoft CRM ISV solution, to help consolidate the various information sources. The software enables similar and slightly different contacts to be intelligently held together and then combined or flagged up for manual input. For example, if John Smith, John M. Smith and J Smith were all held in different databases but were the same person, they can be easily consolidated under just one name.

The complex relationship between people and different accounts led the LGA to insist on a thorough testing of the system before any changes were made. “We went through quite a long business document process,” Bray explained. “There was quite a lot of prototyping. Testing, modifying the code, then running it again.” But there have been no significant problems and everyone agreed they are happy with the final result.

That result is a single database through which all contact details can be reviewed by the LGA’s staff, and all interactions with that client can be listed. Due to their familiarity with Microsoft Outlook 2002, the staff have also taken to it. As a result, less time is wasted on sharing information and chasing contacts and the LGA has a system it can expand to encompass future additions.

Benefits

Ease of Management

The contact database consolidation has provided a significant number of benefits to the LGA. First, it means that a new contact need only be inputted once to the system, where previously numerous staff added the contact manually to their own lists. The fact that there is a central database for contacts also means their details can be kept up-to-date with a minimum of fuss.

Better Customer Service

The new system is improving the events and publications side of the LGA’s business by allowing the association to quickly and effectively target those contacts that might be interested in new products or conferences. It also provides a better service to the customer, as their previous contact with the LGA and any relevant and/or important individual information about them can be readily

and quickly accessed by whomever in the organisation the customer speaks to.

Excellent Business Processes

Internal processes should become more efficient; any member of staff will be able to see at a glance, for example, who is booked on an event and their status. If it became important to contact otherwise unconnected people, if a conference was cancelled for example, the Microsoft CRM software would make the task simple.

Reduction in Administration Time

With all a contact’s details instantly available, LGA staff spend less time sharing information among them and so have more time to concentrate on their core jobs. With more of the organisation’s data readily available, it means that the management team can get a better overview of what is going on and adjust their efforts and focus accordingly.

The reduction in the number of databases has resulted in fewer system administration tasks. As the LGA has moved away from its use of disparate technologies to standardise on Microsoft CRM, it now pays for fewer software licences. The lower cost of the Microsoft CRM installation compared with competing technologies also gave a significant upfront saving that can be used elsewhere in the organisation.

Finally, with the openness of the software, the LGA will be able to expand in the future without having to worry about whether the new technology integrates with their Microsoft CRM software. That should give it a far wider set of options when the need comes.

For More Information

For further information about Microsoft products and services please visit www.microsoft.com/uk or call 0870 60 10 100*.

For hearing impaired customers with a Minicom contact: 0870 50 30 400*.

*Lines are open 8am-6pm Monday to Friday. Please note Numbers prefixed 0870 will be charged at national call rates. For details of national call rate charges please contact your telecoms provider.

For more information about Optevia products and services, call +44 (0) 797 6651090 or visit the Web site at: www.optevia.com

For more information about Local Government Association products and services, call +44 (0) 20 7664 3131 or visit the Web site at: www.lga.gov.uk

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Microsoft Dynamics

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For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

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