STREAMLINE

Microsoft Dynamics CRM

Consumer Finance Company Increases Efficiency and Facilitates Growth

White Paper

Customer Relationship Management

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Microsoft Dynamics CRM

About the Author

Barbara Cummings, a ten-year veteran of customer relationship management (CRM), is Director of Business Development at Brodie Computes Inc. Barb has certifications for both Microsoft Dynamics™ CRM and Maximizer Enterprise CRM applications. She has studied The Customer Experience, and taken courses in Solution Selling and in Canada's PIPEDA Privacy Legislation.

Founded in 1989, Brodie Computes provides a team of business and technology specialists who have successfully delivered solutions to Fortune 1000, mid-sized, and emerging companies. Brodie Computes is one of Canada's top ten CRM partners for both Microsoft® CRM and Maximizer Enterprise.

Brodie Computes is dedicated to helping end users adapt to CRM tools and processes, while providing senior managers with data mining capabilities to guide strategic decision making.

"Our goal is to create total solutions that are as unique as our clients."

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Brodie Computes Inc. is located in Guelph, just outside Toronto in Canada. Karen Brodie, Company President, and Barb Cummings can be reached from locations in North America by calling 888-806-7276, or from outside North America at 519-763-2866 or visit our Web site at www.brodie.com and we will be pleased to respond to requests through Contact Us.

Abstract

Founded in 1994, the Customer is a leading indirect consumer finance company with a focus on non-prime automotive purchase financing. The firm found that its potential for growth and its ability to maintain a reputation for consistent, responsive, and reliable service were constrained by multiple systems that were unable to keep pace with growth.

The Customer needed a single, convenient, robust client database that would allow staff to provide remote and office support effectively, both within the sales process and as part of ongoing operations. The team required an accessible library of marketing materials, the ability to sort and search the customer relationship management (CRM) database, and a way to stay current while significantly reducing the number of incoming e-mail messages. Management recognized two primary issues that affected overall efficiency and decisions: inconsistent data entry, and an inability to mine information and report on its customer base.

With the assistance of partner, Brodie Computes Inc., the Customer deployed a solution based on Microsoft Dynamics™ CRM software, which replaced two existing databases and several systems using Microsoft® Excel® spreadsheet software. Integration with a legacy back-end system further reduced duplication of data entry, enhanced accuracy, and provided a single source of information. The solution included development of conditional field-level security; utilization of custom entities, a many-to-one referential relationship with the custom entities; development of an incrementing counter; and a key field Audit tab.

Today the Customer's 60 Microsoft CRM users across Canada have access to all pertinent data from a single data source. Automatically populating fields, conditional field-level security, and integration have reduced data entry and discrepancies while increasing data accuracy. Area managers now rely on a daily update view in Microsoft CRM, which reduces e-mail volumes by 73 to 80 percent. Data mining and reporting facilitate corporate decisions on a weekly basis.

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Business Situation

The Customer, with assets exceeding CDN$400 million (U.S.$355 million), is a leading provider of automotive purchase financing and consumer installment loans. It required a tailored, customized, and integrated customer relationship management (CRM) solution that would eliminate contact list silos within the organization, and provide a single source for dealer data and all customer contacts. The solution needed to replace contact lists in Microsoft® Outlook® shared public folders, a Maximizer Enterprise CRM database, and contact lists in multiple Microsoft Excel® spreadsheets, while integrating with a back-end Microsoft SQL Server™ database solution that tracks registered dealer accounts and primary contacts.

Prior to selecting a short list for detailed evaluation, the Customer evaluated its needs and researched CRM applications. A team of five key stakeholders, including the project sponsor and project manager, evaluated SalesLogix, Salesforce.com, NetSuite, and Microsoft Dynamics™ CRM. From the beginning, it was clear that some stakeholders preferred a hosted solution.

The evaluation criteria required that the CRM application needed to be able to function on the Customer's established hand-held device platform, Blackberry. The MobileAccess wireless extension designed by TenDigits for Microsoft CRM provided the required functionality including real-time access to data.

The Customer planned to integrate its CRM database with a custom application using Microsoft .NET connection software and a SQL Server–based back-end system. Microsoft CRM (built with Microsoft .NET technology) and the SQL Server database provided the integration capabilities needed. The stakeholder group had reviewed literature related to failed CRM projects and lack of user adoption. Concerns about user adoption were easily addressed because Microsoft CRM can be embedded directly in the Outlook messaging and collaboration client.

The sale and delivery of financing services across Canada can stretch the resources of a growing business. The Customer needed a single, convenient, robust account and contact database that would be easily available to its team members. The account and contact database needed to provide effective remote and office accessibility so that the team could provide support both within the sales process and as part of ongoing operations. The sales representatives also required an easy-to-access library of marketing materials, and the ability to sort and search the CRM database by numerous categories. With e-mail volumes exceeding 150 per day per sales representative, team members were looking for a way to remain current on dealer and contact activities while reducing their e-mail load.

Management recognized two issues that affected overall efficiency and decisions: inconsistent data entry, and the inability to mine information and report on the customer base. Multiple data sources had led to slow reaction times and lost market opportunities.

Solution Overview

After evaluating a number of CRM software applications, the Customer selected Microsoft CRM. With the assistance of Microsoft Business Solutions Partner Brodie Computes Inc., the Customer deployed a new CRM solution that delivered a single shared source of account and contact information, by replacing contact lists in Microsoft Outlook shared public folders, a Maximizer CRM database, and multiple contact lists in Microsoft Excel spreadsheets. Integration with a back-end system running SQL Server reduced data entry and data duplication, enhanced accuracy, and provided a single source of information. The solution included:

- Development of a business-specific conditional field-level security model
- Creation of five custom entities (using the Microsoft CRM point-and-click creation interface)
- Custom entity relationships mapping to the system Account entity
- Multiple custom fields, including the creation of Lookup field attributes on the Account form to the custom entities
- An incrementing counter that automatically generates and stores the back-end system's Account Code field when a prospect becomes a customer
- Integration with a back-end system running SQL Server for specific record types only
- Addition of a read-only Audit tab to the Account form to automatically record key field-specific change dates by creator
- Business-specific views for team leaders to monitor daily account and contact activities of their team
- Blackberry hand-held device integration through the TenDigits-designed MobileAccess for Microsoft CRM, which provides CRM data in real time

Business Issues

The Customer largely relied on contact lists in Outlook shared public folders for customer and prospect information. Although Outlook is not a contact manager or a CRM application, a majority of Canadian businesses rely on Outlook contact lists as their primary contact management and CRM solution.

Team members were comfortable with the Outlook interface. As the Company grew, it added custom fields and entering notes functionality, which allowed it to use Outlook more extensively. Over time, users encountered limitations with this system and began using additional applications and spreadsheets to accomplish specific tasks. Team members relied on e-mail from other members of the team as a way to obtain activity updates, which resulted in three to four times the e-mail volume that they could reasonably address in a single day.

The mobile sales force needed access through Blackberry devices to add and update information while on the road.

Administrative staff had to re-enter the same data in multiple places. Maintaining and ensuring accuracy was time consuming and challenging.

The contact lists in Outlook shared public folders did not facilitate reporting. As a result, management was unable to mine information to review trends, understand their strengths and weaknesses with customers, or evaluate marketing strategies.

Brodie Computes worked with key stakeholders and the customer implementation team to plan, build, and deploy Phase One of the CRM project in less than 90 days. The Customer's business and data requirements that were uncovered during the planning phase increased the scope of work to include building a conditional field-level security model and to integrate with the back-end system. Prior to project launch, the Customer had planned this integration for Phase Two. During the planning phase, the firm determined that user acceptance of the system could be enhanced by eliminating double data entry with the back-end system. The integration with the back-end system was fast-tracked to Phase One.

Solution Architecture

Account Distribution Requirements and Customization

The allocation of a single owner to an Account record in Microsoft CRM 3.0 did not fit the data distribution and lookup requirements of the Customer. Account records needed to be associated with a Zone. Numerous Zones comprise a single Region. Each CRM Account is assigned a Service Representative, Area Manager, and Regional Manager based on the Account's Zone location. Service Representatives and their territories change frequently.

To facilitate the lookup of Account records by Regional Manager, Area Manager, Service Representative, Region and/or Zone, Brodie Computes created five custom entities using point-and-click tailoring features in Microsoft CRM 3.0. The Region, Regional Manager, Area Manager, and Service Representative entities were designed to feed the Zone entity.

When a user creates a new Account record, assigns a Zone to the account, and saves the new record, the Region, Regional Manager, Area Manager, and Service Representative fields are populated automatically from the Zone entity. Similarly, if the user changes or reassigns a Zone field on an account, the Region, Regional Manager, Area Manager, and Service Representative fields are updated automatically. This customization utilizes callouts available through the Microsoft CRM 3.0 Software Development Kit (SDK).

When a new Service Representative is assigned to one or more zones in the Zone entity, all Account records within those zones are updated automatically to reflect the Service Representative change.

Custom System Entity Relationships

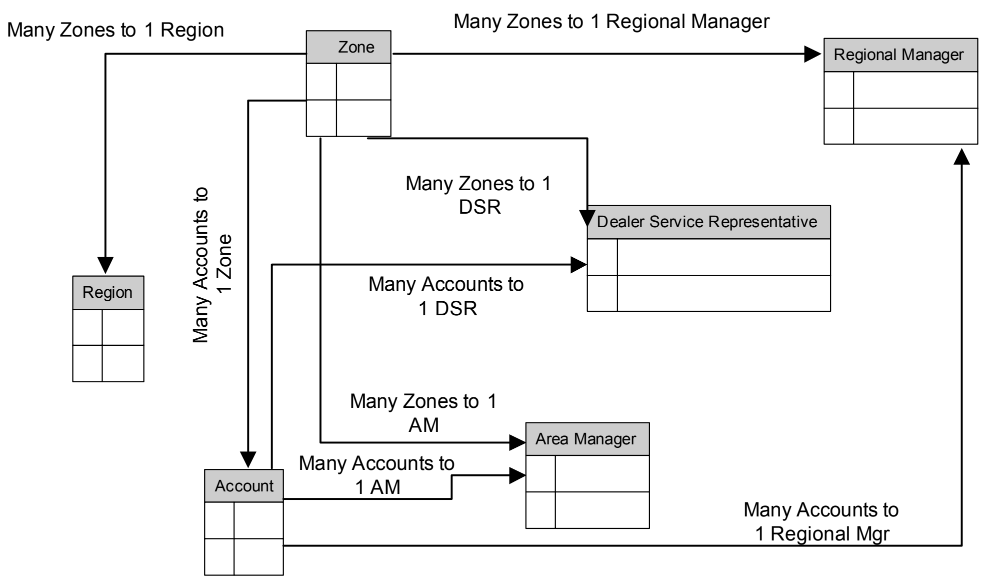

Figure 1. Account is a system entity. Zone, Region, Regional Manager, Area Manager, and Service Representative are custom CRM entities.

CRM Zone Entity—Zone Lookup Field Many-to-One Relationships

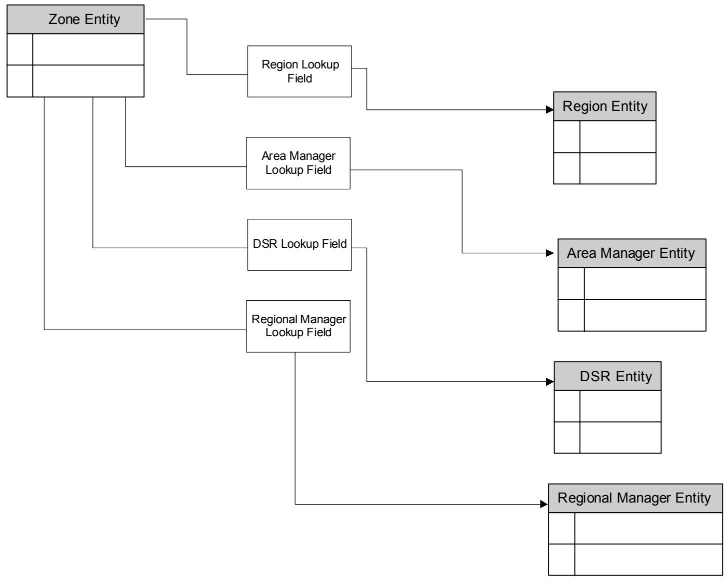

Figure 2. Graphically displays the same referential relationships created in the system on the Account entity, relating the custom Zone, Region, Regional Manager, Area Manager, and Service Representative entities.

Conditional Field-Level Security Requirements and Customization

The Customer's Accounts database contains various Account record types reflecting the organizations it contacts or does business with. Each record is categorized using a field called Relationship Type. This categorization facilitates easy searching.

Certain Account fields are only applicable to a specific Account type. Also, the Customer required that only certain user groups should be able to change some of the fields but not others, based on settings in specific fields.

Certain fields are required, but only if the Relationship Type is a specific type. Some CRM users needed permissions to a limited list of field values, while other CRM users needed permissions to change all field values for the same field. For example, although there are seven items in the Status Pick list, if you are a member of the Restricted User group, only three items are available. If you are a member of the Unrestricted User group, you can select from all seven items.

The new solution uses custom pages built with Microsoft ASP.NET and JScript® development software to determine a user's role when the Account Form is uploaded. Based on the user's role, a JScript program displays the appropriate Account Form with field-level security restrictions to the user.

Process Automation and System Integration

The Customer's sales process requires that when a prospect becomes a customer, the back-end system's Account Code must be generated and stored, and the record must be triggered for upload to the system. Additionally, any time changes are made to fields that are also stored in the system, the record must be triggered for upload to the system.

Also, if any of the contacts stored in the system are changed, those changes must trigger the record for upload to the system.

Integration with the system utilizes callouts to perform the checking and required actions when a user saves an Account or Contact record. New records and changes to existing records are uploaded to the system. Separate callouts are used for an existing record versus a new record. The predefined PreUpdate and PreCreate functions in Microsoft CRM contain the custom code for this integration. The same functions generate and assign the incremented Account Code when appropriate.

When a user updates an existing record or creates a new record, the appropriate callouts determine whether the record pertains to the system, will update the system, or will create a new record in the system. If the callout determines that the record needs to be passed to the system, the Primary Contact and related contact information is also passed to the system.

If the data qualifies to be passed to the system, then a Web service is called and the appropriate data is passed to the Web service, which updates the system.

User Scenarios

Three or four people work together as a team. Before the Microsoft CRM solution was implemented, team members updated each other via e-mail. As a result, each person typically received 80 to 200 e-mail messages per day. Approximately 20 percent of this e-mail required action. It is widely accepted that excessive volumes of e-mail (more than 50 per day per person) disrupt users from their daily tasks. With the new solution, the volume of internal e-mail has been significantly reduced. Using saved queries in Microsoft CRM, team members can easily get a snapshot of the activities for their team for a specific time period.

Several staff members were needed to enter the same Account and Contact information in a number of databases and spreadsheets in order to have the information available for completion of specific tasks. Not only was this duplication of effort time consuming, maintaining multiple lists with accurate reliable information was a challenge. The new Microsoft CRM solution provides a single location for data entry, which ensures one source for reliable customer and prospect information. Back-end systems are updated automatically with applicable changes and new information.

Although some information was available on Blackberry devices, Service Representatives and Area Managers traveling on business did not have access to complete data about their customers. With Microsoft CRM on Blackberry devices, users have improved their response times and have more information readily available when meeting with clients. The TenDigits MobileAccess solution for Microsoft CRM 3.0 provides CRM information in real time to users--anywhere they work.

Previously, users searched the contacts lists in Outlook shared public folders for a specific person. However, they had to select the appropriate list. Also, users were unable to locate a specific account and view a listing of all its related contacts or history. Limited history was available only at the contact level. The Microsoft CRM solution gives users the ability to search by either Account or Contact, and provides a roll-up of all Account history, including history associated with all contacts on a specific account. The solution still allows a user to view the history for a single contact.

Solution Benefits

The new solution:

- Provides a single customer data source, whether the account or contact is in the early prospect stage or is a long-term customer in the sales cycle.
- Eliminates duplication of data entry.
- Increases efficiency by:
    - Making the CRM database available in real time anywhere on BlackBerry devices.
    - Significantly decreasing the volume of e-mail each user receives from internal sources.
- Reduces reaction times.
- Provides increased efficiencies that allow Service Representatives to shift from being reactive to proactive with their client base.
- Offers the ability to attach associated notes and documents to activities, to which users have responded positively.
- Gives staff who previously spent time maintaining multiple databases the use of an advanced search capability in the CRM database in order to provide business intelligence used in decision-making, marketing, and task assignments.

Early indications show an average productivity increase of 30 minutes per day per user. Over the course of a year, this equates to an aggregate productivity gain to the organization of approximately CDN$190,000 (U.S.$169,000) or CDN$3,200 (U.S.$2,843) per year per employee (based on an average annual salary of CDN$50,000 [U.S.$44,000]).

Best Practices

The Customer expressed surprise at the level of detail Brodie Computes undertook in both planning and documentation for the project. Brodie Computes focuses on the details of each customer's unique business processes and in particular on the variables in those processes. Understanding the business process details and building the CRM solution to address both details and variables is critical to the success of any solution.

CRM solutions are a journey. Once implemented, these solutions should continue to evolve with the changing needs of the business. Detailed documentation of the solution's design provides the project team with the foundation upon which the solution is built. This documentation enables management and IT staff to continue the evolution of the CRM project, which ensures the application continues to be a solution that meets the growing needs of the business. Internal training staff also benefit from the documentation, which increases their understanding of both the application and the Customer's unique solution.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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