



Microsoft Dynamics CRM - The Premium Solution for Leading Environmental Health Charity

The Chartered Institute of Environmental Health selects Microsoft Dynamics CRM and Advantage Business Systems to meet its organisational objectives



Chartered Institute of Environmental Health

Introduction

When the Chartered Institute of Environmental Health (CIEH) undertook a business systems review, the finance, marketing and customer service departments quickly recognised a requirement for a Customer Relationship Management solution (CRM), which would provide a 360 degree view of all the organisations customers; both professional members qualification trainers, and integrate all associated sales and ordering with their financial and accounting ERP system – the solution: Microsoft Dynamics CRM.

The Business

The Chartered Institute of Environmental Health is a registered UK charity and the professional voice for environmental health. It sets standards, accredits courses and qualifications for training in environmental health, and provides a voice for its professional members and other environmental health practitioners.

The CIEH provides information, evidence and policy advice to local and national UK government and environmental and public health in the public and private sectors. As an awarding body, CIEH provides qualifications, events, and support materials on topics relevant to health, wellbeing and safety to develop workplace skills and best practice across the UK.



The Need for Change

Due to the nature of the organisation, the CIEH needs to communicate to a variety of customers across different sectors. This includes government and educational members, trainers and health practitioners.

Without a comprehensive customer relationship management system in place, prioritising and communicating with each type of customer, alongside tracking and measuring the ROI delivered from marketing campaigns was not feasible.

The reason for this communication challenge was due in part to the CIEH's legacy of databases. Prior to implementation, customers existed in separate stand-alone silos, with as many as 50 systems containing valuable customer data identified by the project.

Jerome MacGillivray, Head of IT at the CIEH states that it was *'a constant struggle'* to understand who the customer was, and that activities such as customer sales ordering and financial reconciliation relied heavily on manually intensive operations. Jerome MacGillivray continues: *"A unique organisation such as the CIEH requires a 360 degree view of its customers in order to ensure that it can deliver the best service in a cost-effective and timely manner"*.

The organisation realised that the answer lay in bringing in a customer relationship management system, and then integrating it with their accounting and finance system – Microsoft Dynamics GP.



Choosing Microsoft Dynamics CRM and Advantage Business Systems

Having made the decision to purchase a CRM solution to replace all the existing legacy systems, The Chartered Institute of Environmental Health adopted the standard approach to the search and selection of a new solution by documenting their key business requirements. The new solution had to meet the following criteria:

- **Provide a consolidated view of all 'contact' databases:** this would ensure complete visibility of all data across all customer types and streamline communication to and from customers;
- **Strong integration capabilities:** the solution would have to be easily integrated with the existing Finance and Accounting software to help reduce the cost of business processes, by automating the relationship between the customer databases and the Finance department;
- **Automated work flow process:** to reduce the manual input of data and create more efficient business processes;
- **Flexible reporting:** to enable well-crafted marketing reports to determine ROI derived from marketing activities;
- **Better Business Insight:** so that the organisation can be monitored at a group level using real time, reliable data.

Following a review of leading CRM software providers, such as SAP and SIEBEL, the CIEH chose Microsoft Dynamics CRM, due to its proven functionality and capabilities to meet the desired objectives, especially in the areas of integration and work flow.

Jerome also cited as a determinant in the CRM selection process, the fact that *"CIEH is a Microsoft house. We operate in a Microsoft SQL Server environment and utilise products such as Microsoft SharePoint 2007, which complement our accounting and finance ERP system – Microsoft Dynamics GP. It was critical that when choosing a CRM solution, there would be a seamless integration with Microsoft Dynamics GP, and that the technology remained aligned with the broader strategic architecture of the organisation. The Microsoft brand reassured us that the solution would continue to be developed into the future and is a technology which would allow us to deploy the solution across the whole organisation."*

On the subject of the organisation's selection of Advantage Business Systems Ltd as preferred partner, Jerome says: *"from our past experience of working with Advantage when implementing Microsoft Dynamics GP, we have always been extremely impressed with Advantage's understanding of our business and the Not-for-Profit sector."*

Unlike other CRM providers, we knew that Advantage would ensure that our objectives were met using a project management approach and proven 'OnTrack' Methodology to deliver good customer delivery". When asked about the organisation's relationship with Advantage today, Jerome commented *"Advantage provides an outstanding level of service. We are aware that other partners exist, however Advantage has always met our objectives within a timely and efficient fashion and we are happy to continue to partner with them".*

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The Benefits

Following a six month implementation at the CIEH's head office - the organisation now has a real group wide business management solution which simplifies the day to day communication and sales process, helping to streamline costs and unlock valuable customer and marketing data, with a direct link to the Finance and Accounting system through using a customisable third party add on from Nolan's Computers Ltd.

In Conclusion

To date, the CIEH remains confident in the selection of Microsoft Dynamics CRM as its customer relationship management tool of choice.

Since the implementation, the CIEH has continued to add additional functionality to its CRM solution to increase its understanding of its data and to create new channels for interacting with customers, for example, the CIEH has deployed the Microsoft c360 CRM module – a third party software solution acquired through its partnership with Advantage, which provides a seamless integrated email marketing tool, and is now in the process of extending Microsoft Dynamics CRM by implementing online Events management functionality.

Looking to the future, the CIEH will be seeking to invest further into the Microsoft Dynamics portfolio of solutions looking to turn information into intelligence with Microsoft BI tools. Jerome MacGillivray says *"We use Microsoft Dynamics CRM to meet our sales, marketing and customer service requirements and Microsoft Dynamics GP for our financial and accounting requirements – we are now keen to explore the benefits of Microsoft Business Intelligence. We are already utilising Microsoft SQL Reporting Services within Microsoft Dynamics CRM and Financial Analysis Cube within Microsoft Dynamics GP and we are keen to bridge the gap with Microsoft Business Intelligence systems such as Microsoft PerformancePoint"*.

Advantage Business Systems – A quality partner you can trust

Advantage Business Systems is a business solutions provider, specialising in business management software based around Microsoft technologies. Advantage is experienced in addressing business problems and challenges to deliver solutions that provide business agility, improved productivity and performance.

For further information or to discuss your needs, contact Advantage Business Systems by phone on 020 3004 4600, visit www.advantage.co.uk or email info@advantage.co.uk