

MICROSOFT APPLICATION SOLUTIONS:

Microsoft Dynamics CRM 3.0

**CUSTOMER PROFILE**

B-Skill was established in March 2000. They provide a wide range of training and support to employers, adults and young people.

Focusing on the support service industry, B-Skill cover areas ranging from cleaning and catering to business administration, vehicle valeting and security.

The courses have the highest achievement levels in the industry and lead to apprenticeship positions as well as qualifications such as NVQs and other specialist certifications.

B-Skill has grown to provide the widest range of direct delivered support service qualifications available from any single provider. As part of the 'Train to Gain' project, supported by the Learning and Skills Council (LSC), B-Skill has recently been awarded contracts to provide training and skills advice to several regions in England.

B-Skill recognises that the key to successful delivery is the professional, highly motivated and committed staff they employ.

Knowledge at their fingertips

"Waterstons' have provided us with a customer management system that we can leverage many benefits from, both now and in the future. I really feel that our needs as a growing business have been well understood, anticipated and met with the highest degree of professionalism."

Paul Wileman, Managing Director, B-Skill

THE CHALLENGE

B-Skill has expanded from a government funded regional training provider, to a national and commercial organisation. Consequently, the role of customer care has taken on more importance than ever before. In order to improve care for new and existing customers (companies and the trainees they take on), B-Skill required a solution which would allow all customer information to be stored in a central repository.

In addition, access needed to be given to relevant employees to receive timely and accurate customer information so that it could be transformed into clear actions.

Waterstons recommended implementing a Customer Relationship Management (CRM) system. This would enable all customer information to be accessed from one point and could be fully integrated with B-Skill's existing application.

IMPLEMENTATION

Microsoft® Dynamics CRM 3.0 was selected as it integrates easily with Microsoft Office and Outlook; software B-Skill was already using and familiar with. Waterstons worked with B-Skill to ensure a smooth implementation:

- The necessary servers were sourced, installed and configured before implementing the CRM software.
- Waterstons liaised with B-Skill's Directors and Marketing Department to understand business processes and import existing customer

information. Any alterations required were identified and adjusted accordingly, ensuring the system met B-Skill's needs.

- Individual training was given to members of staff who would have principal use of the CRM system and a full day of group training was given to other users.

POTENTIAL REALISED

The implementation of Microsoft Dynamics CRM 3.0 provides B-Skill with the following benefits:

- The facility to track e-mails and appointments directly from Microsoft Outlook. The tracked information is held within relevant customer folders that show a full history from all users.
- All customer information is accessible through one centralised point by all users.
- Customer information is automatically streamlined through the CRM system to B-Skill's existing application. Microsoft Word and Excel can also be used to transfer data into CRM.
- Users are able to work solely within Microsoft Outlook rather than having to open different applications, making the working environment simpler to use.
- The system is available to off site users wishing to access customer data from any Personal Digital Assistant (PDA), laptop or browser.
- Microsoft Dynamics CRM 3.0 is easy to customise and adapt to future business plans and growth.



CREATIVE • PROACTIVE • DEPENDABLE

More Information

The training Waterstons provided not only meant employees could use the system as soon as it was implemented, but that they would be able to use additional tools as the application develops:

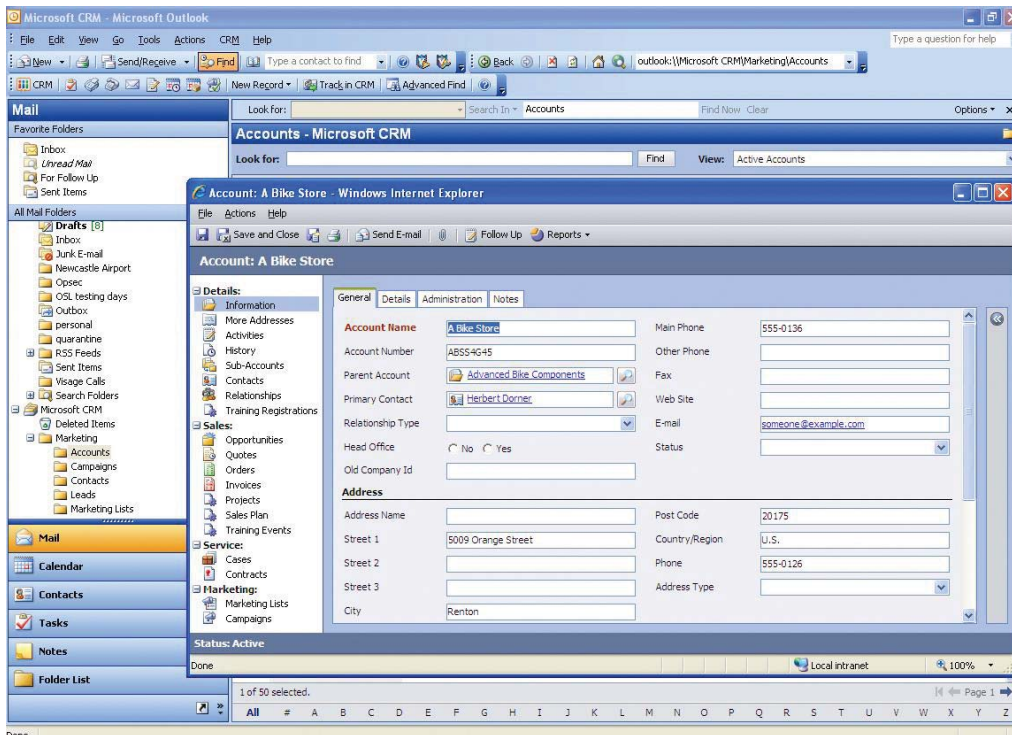
- Easy to modify forms, data fields and information relationships so that users can get the customised information they need.
- Fast data searches across large volumes of customer data that help users find the information easily.
- Simple and fast connectivity to external data sources giving users access to relevant information.
- Advanced management and notification tools that are centralised and give staff the right information to manage a CRM system.

FUTURE PLANS

B-Skill has now got the basis on which to create a more bespoke CRM system. Further developments are currently being undertaken by Waterstons to take advantage of the flexibility of the system by enhancing its features. Training was conducted with the foresight of such development. Facilities available with Microsoft Dynamics CRM 3.0 are:

- A new marketing automation module makes it easy to build customer or lead lists and create, track and follow up on marketing campaigns. Although B-Skill uses a third party marketing agent, information could be transferred for in house use.
- A 'Quick Campaign Wizard' which allows the marketing and sales departments to send out e-mail campaigns to targeted lists and track responses.

- Service scheduling allows employees with access to centrally manage all aspects of a customer request, from logging and dispatching to tracking and follow-up.
- Easy customisation to business workflow by adding custom objects and activities, designing custom views for different users, and building business logic into the CRM system so that it automates repetitive tasks, tells users next steps, sends e-mails and raises alerts for open items.
- The ability to transfer data from CRM into Microsoft Excel for analysis, enabling managers to see how the business is doing, or into Microsoft SharePoint Server for updating executive dashboards and collaborating on customer related documents.



"We were impressed with the professional service provided by Waterstons throughout the CRM implementation. The entire Waterstons team has been well managed, focused and efficient."

Paul Wileman, Managing Director, B-Skill

Users are able to work solely within Microsoft Outlook rather than having to open different applications.