



Mensura's contract managers are now making quotes more efficiently thanks to Microsoft Dynamics CRM

Mensura is the third biggest Workers' Compensation insurer in the private sector today. Various types of software, which were not integrated and were increasingly old, were hampering the effectiveness of the commercial teams and the contract managers, especially with regard to making quotes and following up on them. The group decided, therefore, to streamline the quote management process.

Microsoft Dynamics CRM and its xRM development environment have turned out to be the ideal solutions to meet

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RMB chooses to work with CRM 2011 even before its release date!

Interview with Anaïs Loits

In 2010, RMB decided to implement Microsoft Dynamics CRM and chose to start immediately with CRM 2011. Meanwhile, the beta version was successfully installed.

Why CRM 2011, even if it was not even on the market yet?

We hesitated at the beginning of the project between implementing Dynamics CRM 4.0 first, or risking to directly install CRM 2011. We soon realized that many features that we wanted were standard in version 2011 and took the risk. We were particularly interested by the com-

plete integration with Outlook and the possibility to easily create charts and personalized dashboards.

How will you use CRM?

The CRM will be used primarily for Sales Force Automation: during the analysis phase, we focused on how to define areas for each sales rep, how to automatically attribute Campaign Activities according to these areas, ... Our CRM will also be used as an e-mailing platform, and will be diverted for the management of internal briefings.

Why Microsoft and not the competition?

We investigated several other CRM solutions before making our

decision. Several features had to be present in our future tool: definition of commercial areas, interface with other databases or applications, emailing platform. One of the decisive criteria was the synchronization between CRM and Outlook. Microsoft is the best performer in this area.

In addition, as Dynamics is a Microsoft product, it is easier for users to adopt, because it's a familiar interface. Finally, Microsoft is a guarantee of good quality.

Which CRM trends do you spot, how will CRM evolve according to you?

Generally, RMB would like to go further in the strategic exploita-

tion of the information they possess. Therefore any tool that can move in this direction will be interesting to explore.

Another trend that RMB will certainly follow concerns Mobile CRM

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See page 11 for more info.

AXA Belgium



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"We now have much better insight into the business and sales activities in the field on a daily basis..."

Keytrade Banking



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"Travi@ta's approach is pragmatic and structured, and their consultants are very accessible..."

Concentra



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"Monitoring marketing campaign responses is facilitated by automatic visualizations in MS CRM..."

EFC



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"The integration of MS CRM with our website offers many a possibility of optimising the service to our members..."

Hotel Concepts



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"With CRM-specialist Travi@ta we had a Microsoft-partner who knows CRM like the back of their hand..."

AXA Belgium Increases Quality of Service with Microsoft Dynamics CRM



The insurance business of AXA Belgium – the largest non-life insurer in the country and second largest in life insurance – set an objective to improve the quality of service offered to its 5,000 independent brokers. These brokers sell the company's products in a highly competitive market to hundreds of thousands of clients. The company chose Microsoft Dynamics CRM for its new customer relationship management system to help business managers support brokers more effectively with targeted marketing campaigns. In addition to a broker portal, AXA introduced processes for marketing, sales, training, service, and document management. Supported by the CRM system, visits to AXA Belgium brokers have increased, and the solution is now under evaluation for adoption by AXA insurance subsidiaries in other countries.

Situation

AXA Belgium's insurance business concerns private individuals and small, medium-sized and large enterprises. The insurance division – which specialises in property, casualty, and life insurance – is the largest non-life insurer in the country and the second biggest in life insurance. It operates through a workforce of 200 business managers and more than 5,000 professional, independent insurance brokers who also represent other brands. A second activity concerns the distribution of AXA Bank and insurance products through a network of 940 AXA Bank agencies.

In 2006, AXA Belgium scoped its first customer relationship manage-

ment (CRM) project called Management And Relationships Instrument Linked to Your Needs (MARILYN). The aim of the project was to help AXA Belgium business managers improve their performance and collaboration with its vast network of independent brokers and dealers in Belgium.

Jean-Claude Swalus, Business Solution Manager, AXA Belgium, says: "We wanted to increase the service level to our brokers. Previously, customer information was stored in disparate Microsoft Excel spreadsheets and in-house developed applications. Management had no central view of structured relationships between the company and individual brokers or dealers, or of feedback from them on sales activities. We needed this information to make sure we were delivering the appropriate solutions."

Requirements for MARILYN accelerated after 2006, with AXA Belgium needing a complete distribution relationship management solution. Additional processes have been added to the CRM system to cover critical functions necessary to optimise processes and performance. These include activity management, marketing, sales, event and training management, service and document management, and a broker portal.

Solution

AXA Belgium worked with Microsoft Gold Certified Partner Travi@ta, which launched its MARILYN solution in 2006 on an earlier version of Microsoft Dynamics CRM. Since then, MARILYN has been updated easily to the latest release.

Before deciding to work with Travi@ta and Microsoft, AXA Belgium considered solutions from other vendors. After a proof of concept lasting 30 days with Travi@ta, Microsoft Dynamics CRM was able to display all the broker-related data

agers receive weekly automated reports on sales activity, which also assist in monitoring performance across the company.

Benefits

The success of the AXA Belgium MARILYN CRM tool is best judged by the increase of visits by business managers to the network of brokers and dealers throughout Belgium. The solution extends far beyond its original purpose of performance management. It is helping to develop marketing and distribution planning and improving communication between brokers and AXA head office.

Quality of Service Increases with CRM Solution

AXA Belgium has improved the efficiency and quality of its relationships with independent brokers. The company has the advantage of a powerful and up-to-date CRM system in Microsoft Dynamics CRM, helping it to plan sales activities and coordinate marketing and distribution work.

Jean-Claude Swalus says: "We now have much better insight into the business and sales activities in the field on a daily basis. Information that resided in several databases is consolidated into one system, giving our business managers more time for customer-facing interactions. Productivity has improved with Microsoft Dynamics CRM."

often represent other insurance companies, which makes relationship management even more complex. Previously, AXA Belgium didn't have a 360-degree view of brokers' work or feedback on customer satisfaction related

to the company's products compared to other brands. Through the CRM system, it can support independent brokers more effectively with targeted marketing campaigns, and offer them more opportunities for training and personal development.

Now there is also regular reporting into head office, and, as a result, the quality and frequency of communication between business managers and brokers has improved. Jean-Claude Swalus says: "Through CRM we've gained much better insight into the work of our independent brokers and bankers."

Knowledge Transfer Ensures AXA Belgium Manages CRM Efficiently

AXA Belgium has forged a strong business partnership with Travi@ta in managing the ongoing development of the MARILYN product.

While Travi@ta still maintains an on-site presence, the number of technicians has been reduced by half as AXA Belgium handles more of the operational management itself. There are now seven other insurance companies in Belgium using the Travi@ta CRM solution for insurance.

AXA Belgium Endorses Partner for 2010 Microsoft Awards

Due to the success of MARILYN, Travi@ta was selected as a finalist for the 2010 Microsoft Partner Awards in the Microsoft Dynamics Financial Services Partner of the Year Award category. Jean-Claude Swalus says: "Travi@ta made the acronym for our CRM project MARILYN – Management And Relationships Instrument Linked to Your Needs – become reality."

Max Fatouretchi, Dynamics Industry Manager, Financial Services Industry, says: "It's incredible to see the level of expertise that our partners continue to exhibit as they create and deliver innovative solutions and services to help expand the businesses, meet customer needs, and cut costs."

Wim Geukens, Managing Partner, Travi@ta, adds: "Microsoft Dynamics CRM integrates easily with Microsoft Office Outlook. This function avoids users having to switch in and out of applications while managing their daily work."



from the mainframe from within Microsoft Office Outlook.

The success of the Microsoft Dynamics CRM toolset at AXA Belgium – which also includes Microsoft collaboration and reporting technology – is such that the solution has won an internal prize for excellence at AXA Belgium in 2010. As a result, it has been demonstrated to some other AXA entities abroad, which are now considering whether to acquire the software for their businesses.

The flexibility of Microsoft Dynamics CRM has speeded up its adoption by AXA Belgium business managers and others in operations and product development – around 600 employees now use CRM every day. Ease of integration with AXA Belgium's line-of-business applications – principally the broker repository called Azimut – was another consideration in choosing Microsoft Dynamics CRM. The integration capability ensures that business man-

Marketing and Training Initiatives Aid Broker Recruitment and Retention

Brokers representing AXA Belgium are not tied to the brand and

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- essential commercial and financial webtools
- the geographical scatter of your customers, prospects, suppliers



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Mercator's account managers gain time thanks to a good CRM approach

Mercator offers insurances for private individuals and SMEs in Flanders. This is done via a network of some 1200 self-employed brokers. They receive support and advice from some 30 account managers. This way, the bond between Mercator and the brokers can be made stronger.

In the past, account managers would list their contacts and activities in a non-structured way, very often locally on their own laptop. Because of this fragmented way of working, a lot of time was wasted looking for information.

Mercator decided to invest in Microsoft Dynamics CRM. The implementation and management of the new software were completely outsourced to CRM partner Travi@ta. The account managers now use Dynamics CRM as a central archive of client information and history. Finding and sharing information has become much simpler. Account managers can work much more efficiently and time is freed up for the brokers to offer even more services.

Mercator's account managers use Microsoft Dynamics CRM for planning and for following-up of contacts with brokers. This results in streamlined and professional sales processes. The district managers too can steer the commercial activities much better and much more efficiently this way.

"Mercator sells insurances through self-employed brokers. At the moment, there are about 1200 offices in Flanders offering our in-

surances", says Noël Van de Velde, Manager Distribution Support at Mercator.

The self-employed brokers, which are not bound to Mercator and as such are also allowed to sell products of other companies, receive support from about 30 account managers who help them on a relational, commercial and technical level. Each account manager is in charge of about 40 brokers, and must keep abreast of the ins and outs of those offices.

Quick start with flexible solutions

"In the past, the account managers used various applications, like Access and Excel, and files stored on their laptop locally in order to store their information" says Noël Van de Velde. "This made it difficult to find and share this information. The back-up wasn't ideal either. There was little overview, to such extent that the two commercial directors could not sufficiently steer the activities of the account managers. For all these reasons it was decided to streamline the sales activities with the help of new software. We looked at various possibilities. We wanted

a solution which allowed us to start quickly and which we could adapt gradually later on. Travi@ta had experience in the insurance sector and also with Microsoft Dynamics CRM. Their proof of concept – which they delivered really quickly – convinced us. Moreover, Mercator already had lots of Microsoft technology in-house, and the Dynamics CRM links up perfectly to it."

Everything outsourced

Mercator itself employs 60 IT specialists, but because they are occupied with the complete overhaul of the back office, the enterprise decided to outsource the development and also the future management of the CRM package to Travi@ta.

"The objective with the CRM project was to have the first phase operational really quickly", says Wim Geukens, Managing Partner at Travi@ta. "The groundwork was laid in about 3 to 4 months. The account managers themselves were also involved in the project. We have integrated the Dynamics CRM with the data warehouse. The account managers work via a VPN connection with the central running CRM software, but they also have a local 'mini version' which they can use offline and synchronise afterwards."

Each account manager gains two hours per week

Thanks to the Dynamics CRM, the account managers can find important information like the contact details of the brokers and sales figures per office much more efficiently. "Due to this greater efficiency every account manager can achieve a time gain of two hours per week", says Noël Van de Velde. "In the past a lot of time was wasted with e-mailing and searching for information."

The account managers can also give their brokers better advice. They can help them to get a better view on their clients, and support them when attracting new customers with campaigns, prospection and step-by-step plans. The planning conversations with the brokers are also stored in the CRM, so that planning and the results are easier to follow up than before. This allows Mercator to adjust better and more objectively at management level where needed. And because all the important information is stored centrally, it doesn't get lost when an account manager leaves the company.

sis of the portfolio or a step-by-step plan for a broker. Moreover, in this way, the commercial directors know which account managers make use of our range of services, with which they can bind the brokers to us."

A broker always has two account managers – one who is specialised in life insurance, and a second for indemnity insurance. Via the CRM solution both colleagues can now share up-to-date information, so that they are aware of each other's activities. This looks much more professional towards the broker.

More streamlining

At this moment there are 50 users using the CRM software. "In the long term, we also want the people from the back office working with Dynamics CRM, so that when, for instance, a broker calls with a complaint about the handling of a damage case, that information can also be entered into his CRM file", Noël Van de Velde explains. "That way the account managers are up-to-date and they can anticipate the situation. We are also planning on storing the e-mail traffic in the CRM, which will enable us to keep track of the history of the communication with brokers and follow it up. In the future it will also be possible to execute certain actions towards end clients, like direct mailings, for the brokers and follow up in the CRM. Apart from that it is also possible to link the CRM with the portal site for brokers. That portal site serves for setting up the policies but also for information about and registrations for campaigns. It would be very interesting to integrate this in the CRM too."

Automatic workflows

Noël Van de Velde: "Because of the automatic workflows in Dynamics CRM the account managers can work faster and more efficient. They can, for instance, enter actions into the CRM after which an automatic e-mail is sent to the commercial secretariat for requesting an analy-



CRM for Insurance SEMINAR: 22th March 2011
 More info: www.traviata.be



Case story Mensura
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the needs of users. After implementing a "Proof of Concept" in ten days, CRM partner Travi@ta put in place a new CRM solution. Nowadays, the 360° visibility of centralised information contributes to better decision-making and improves the performance of business negotiations.

Towards better management of commercial activities

At the end of 2008, Mensura Insurances management asked the Information & Process Management (IPM) department to study new processes which would help them to attain better operational effectiveness.

Frédéric Kekenbosch, Business Process Manager: "While the initial goal related mainly to quote management, we quickly extended the project, so that it would also deal with processes related to supporting sales activities, relationships with brokers, and the mobility of our Sales team."

A true xRM tool

The IPM department analysis led in 2009 to the first version of specifications which would be the basis for the choice of a new standard piece of software. "A first demo of Microsoft Dynamics CRM by Travi@ta enabled us to realise the possibilities that a true xRM development tool can offer. A 'Proof of Concept', put in place by Travi@ta in barely ten days, convinced us that the xRM environment which accompanies Microsoft Dynamics CRM had the potential to meet our needs," explained Frédéric Kekenbosch.

Proof of Concept

The implementation of a 'Proof of Concept' was to enable the test-



ing of the performance of Microsoft Dynamics CRM when it came to a large volume of data: 170,000 client descriptions, 5,000 brokers, 30,000 insurance contracts and almost 200,000 lines of financial data to be managed in a single CRM application.

From the beginning, the involvement of users was a crucial element in the setting up of the test environment: ten key users from different departments, including members of Management, sales representatives and a few managers from the Contracts department were able to test the application and give their opinion on how user-friendly it was, its performance, the integration of data from other software used by Mensura, and whether

it would be possible to see these when on the move or working remotely.

Frédéric Kekenbosch: "Compared to the alternative, which was to develop a home-made solution, the 'Proof of Concept' showed that Microsoft Dynamics CRM provided an additional wealth of functions thanks to its user-friendliness and its native integration with other office tools. Recreating this would have been possible, but we would have been missing out on what already existed elsewhere, and with greater functionality.

Calculation tool

The journey towards implementing the new system started in March 2010. The first stage was replacing

the existing quote management tool and improving the visibility of client and contract information.

In the past, contract managers had to use different pieces of software to make a quote, with an immediate consequence, redundant data encoding taking place. At the same time, the business teams didn't have a truly centralised tool to check information relating to quotes, contracts, and clients.

The official date of the launch of the first phase of the Microsoft Dynamics CRM project was December 1st 2010. In the weeks preceding the launch, Travi@ta and Mensura put in place an intensive training programme for users, allowing six half-days of training for each of the 40 users.

Frédéric Kekenbosch: "With a new module developed in the xRM environment, we wanted to standardise and rationalise our quote calculation process. The goal was clearly to save time when making a quote. We will measure it after a few months of active use. But it is already clear that the integration of Microsoft Dynamics CRM with Microsoft Outlook contributes to user-friendliness and effectiveness."

Help with decisions and improved visibility

Microsoft Dynamics CRM is also a tool which helps the decision making process: based on inputted data and parameters and rules put in place, the system automatically suggests the appropriate rate to put into an offer, which means the contract managers don't have to make manual, Excel-table-based calculations.

Thanks to this centralisation, the company data are also more visible, for the management as well as for the commercial department. It is now possible for employees to work on the move: they can work remotely – online, or offline when an internet connection is not available.

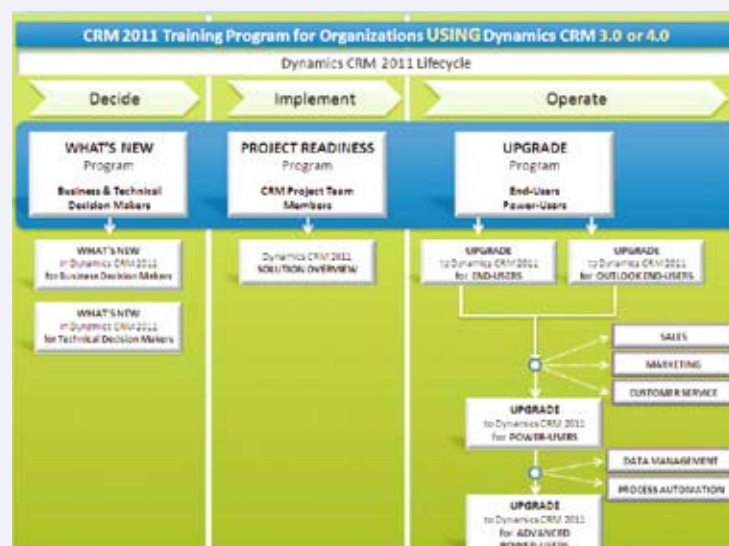
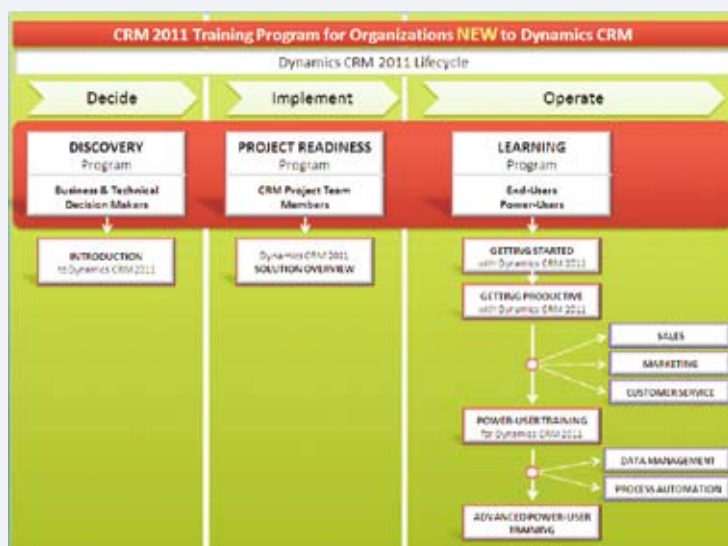
A 360° view

At the end of January 2011, the second phase of the project at Mensura allowed to make all the financial and technical information on the brokers available for the contract managers. This brought added value to their negotiations with the brokers.

"Salespeople now have quick access to the broker's portfolio and, when he is negotiating or preparing a contract with him, he can see through a single, simple view what the broker's contracts, covered risks and the client's premium are. They don't have to read every file or contract anymore. If they are shown only what is useful for them, in the end, they save time," comments Frédéric Kekenbosch.

In conclusion, Frédéric Kekenbosch explains how the partnership with Travi@ta worked. "Travi@ta stands out for its undeniable expertise with regards to the Microsoft Dynamics CRM solution. Integrating our business logics within the tool was not easy. It took time, but the partnership between our IT teams and Travi@ta allowed us to obtain the result that was expected by the business. What's more, they were professional in their approach to skills transfer so that our IT team could become truly independent."

New CRM 2011 Training Tracks at Travi@ta's CRM Academy



Travi@ta's CRM Academy is ready for CRM 2011! While our Dynamics CRM 4.0 courses will still be programmed, brand new training sessions and course material have been developed for Microsoft Dynamics CRM 2011.

These open course sessions come in two separate tracks to meet the requirements of both new Dynamics CRM users and enterprises already working with MS CRM 3.0 or 4.0 ("What's new").

Check out the course calendar on www.traviata.be

**What's new in Dynamics CRM 2011 Training:
2 and 3 March 2011**





Microsoft Dynamics CRM provides proactive follow-up of leads at Keytrade Bank

The marketing strategy of Keytrade Bank stands out through an individual and personalised approach for every customer or prospect, in contrast to the classic market segmentation found in traditional banks. For this reason, Keytrade Bank needed a centralised CRM system and chose Microsoft Dynamics CRM, which it implemented with CRM partner Travi@ta. The first and most important phase – the optimisation of the marketing and sales paths – is now complete. The system sees to it that leads, originating from various sources (spontaneous registrations via the website, events, e-mail campaigns, etc.), are followed up from A to Z in a proactive manner and that marketing campaigns can be strongly personalised based on correct contact information.

In 1998, the first Belgian online investment site was set up under the name VMS-Keytrade, an initiative that immediately strived for success on an enormous scale. In 2002, VMS-Keytrade acquired bank status through the takeover of RealBank and changed its name to Keytrade

Bank. Today Keytrade Bank is part of the Crédit Agricole Group, one of the largest banking groups in Europe.

Thibault de Barsy, Sales & Marketing Manager: "What makes Keytrade Bank unique is the combination of banking and stock ex-

change activities under one roof. In addition, during the financial crisis we were able to attract a great many new customers who were turning their backs on traditional banks."

Individual and personalised CRM approach is central

The marketing strategy of Keytrade Bank deviates considerably from what is common with traditional banks. Seeing as the company does not sell any of its own investment products, it considers it one of its core tasks to inform customers regarding financial products that are on the market and in so doing to allow customers to make a decision about their investments themselves.

"In their marketing approach, traditional banks start out from a static socioeconomic market segmentation based on age, gender, income etc. Keytrade Bank's approach is totally different: we strive for a segmentation on an individual level, according to the individual investment profile and the risk strategy that the customer indicates him or herself based on a range of contact moments", explains Thibault de Barsy.

Integrated CRM approach necessary

The number of Keytrade Bank customers doubled in the past 3 years to reach 135,000, both through takeovers and organic growth. As a result of this, Keytrade Bank found itself facing a major challenge: the monitoring of smooth access to contact information for all employees whilst retaining integrity and security in this regard.

A collection of isolated applications and manual processes in the company therefore had to make way for an integrated CRM system: this was to allow leads originating from a variety of channels to be registered and followed up on an individual basis from start to finish. In a second phase, Keytrade Bank also wanted to integrate the helpdesk activities using the same CRM system.

The quest for a simple yet powerful CRM system

Keytrade Bank had clear objectives in mind as regards ease of use:

the new CRM package had to reflect the simplicity and flexibility that characterised the sales and marketing processes in the still young company. At the same time, the new solution however had to be able to evolve to keep pace with the strong growth of the company.

Thibault de Barsy: "Many CRM systems are quite complex and require the support of a whole CRM team in larger organisations. We however wanted it to be managed by a limited number of people."

Keytrade Bank took a close look at a number of CRM packages and Microsoft Dynamics CRM emerged as the winner due to its flexibility and user-friendliness. On the advice of Microsoft, Keytrade Bank called on CRM partner Travi@ta to steer the implementation in the right direction.

A to Z follow-up of leads

The green light for the implementation was given in May 2009. Keytrade Bank provided a thorough breakdown of the various work processes in the marketing and sales departments, which was subsequently translated into a technical analysis by Travi@ta.

The heart of the new CRM system reflects the unique commercial approach of Keytrade Bank, which is strongly directed towards an individualised and personalised approach for customers and prospects. Leads from a variety of channels – telephone, website, information sessions, trade shows, etc. – are systematically registered via Microsoft Dynamics CRM and are followed up from A to Z by the sales team.

For example, someone who requests a brochure via the website must fill in his or her details online to do so; this information is automatically recorded in Microsoft Dynamics CRM, and after this Keytrade Bank employees are able to carry out the further follow-up of the lead themselves.

E-mail campaigns: integration with Microsoft Dynamics CRM

Keytrade Bank carries out a very large number of e-mail campaigns, both aimed at broad target groups

with over 100,000 contacts and targeted campaigns at regional level. For this purpose, the company uses a specialised e-mail tool that was integrated into Microsoft Dynamics CRM by Travi@ta.

Christophe Bernard, Marketing CRM Officer at Keytrade Bank: "Based on the extensive information in Microsoft Dynamics CRM and the information that is recorded during every campaign, a persistent personalisation of future contact moments is made possible. In so doing we also have a better idea of the result of every marketing action and we are able to increase the effectiveness of any possible follow-up actions still further."

Knowledge transfer in a trusted work environment

In order to allow the knowledge transfer to go as smoothly as possible, Keytrade Bank chose to have two employees thoroughly trained via the Travi@ta Academy. These two people are now responsible for the knowledge transfer to the users of the system.

Christophe Bernard: "Today 20 Keytrade Bank employees use Microsoft Dynamics CRM. The solution is striking for its user-friendliness and as an extension of Outlook it connects perfectly with the trusted work environment of our employees."

Collaboration with Travi@ta

The next phase of the Keytrade Bank CRM project is the introduction of Microsoft Dynamics CRM in the coordination of helpdesk activities and the coupling with the telephone exchange. Naturally Travi@ta will also be called on to help.

"Travi@ta works pragmatically and in a well-structured way and their consultants are highly accessible. Many IT companies with a broader service offer try to take advantage by always promoting extra products or services. Travi@ta sticks to the project for which it was contacted and do a very professional job for that matter", concludes Thibault de Barsy. ■

Customer Centric Banking with Travi@ta's "CRM for Banking" Solution

As a CRM for Financial Services specialist, Travi@ta offers a **Banking CRM Solution**, based on Microsoft Dynamics CRM, that allows Banks to attract new customers, retain existing customers, improve operational efficiency and deal with a continuously evolving regulatory environment. This solution aims towards a customer centric banking experience, making customer information more accessible, enhancing quality of customer communication, increasing customer satisfaction and service consistency and improving effectiveness and measurability of campaign activities.

A Single view of the customer

Customer profiles that allow agents and relationship managers to capture client information at every contact point, help them to build strategic customer knowledge and insight over time.

With "Single View of the Customer", all customer demographics, assets, liabilities, product usage, open cases and complaints are

collected on a single page.

With the customer interaction history module, all customer interaction history such as internet banking usage, branch visits, e-mail sent and received, and SMS messages is replicated to MS CRM.

Sales Force Automation

Account managers can anticipate changes in each client's life cycle and the market to make appropriate offerings, resulting in reduced time and increased profits of their portfolio.



CRM for Banking SEMINAR: 21th february 2011
 More info: www.traviata.be

"Sales Force Automation" shows the number of visits made, number of proposals given and the total number of products.

It is possible to manage all customer interactions and planned activities within a single business platform.

Customer Feedback (complaints and customer satisfaction)

There are 3 types of customer feedback: inquiries, suggestions and complaints.

Whatever the type, the simple goal should be that the customer tells the story only once.

They receive an SMS thanking them for their feedback (with tracking number). Feedback is then assigned to queues for operations, for example Card ops / Cash ops / IT / Admin / Branch queues. SLA's are defined on segments and priorities of feedback type.

Customer Call Center automation

Agents get real-time access to customer history, accounts, activities, and interaction information, regardless of the customer's point of contact with the bank.

All data is available in one application, so the call center agent doesn't have to learn to work with multiple applications (loan management, credit card, cheque imaging application,...) and doesn't have to switch from one screen to another.

Lead generation and campaign management

With Campaign management, it is possible to define the campaigns, associate them with target lists, prepare the call scripts, distribute calls to a team and monitor campaign execution.

Lead Capture allows to capture leads on the internet and assign them.

Customer Retention

The tool enables Relationship building using Social Media (Facebook / LinkedIn): send out Friend invitations, store Facebook attributes in CRM (personal data), publish campaigns on Facebook and access LinkedIn access from CRM (professional data). ■

Concentra achieves more results from customer contact and campaigns thanks to central CRM system

Concentra is the community media group in Belgium. Concentra newspapers (including *Het Belang van Limburg*, *Gazet van Antwerpen* and *Metro*), magazines, TV channels, radio stations and websites are central in regional or demographic communities. The group as a whole has around 1,100 employees.

Previously, Concentra used a self-developed sales force application. The system had been in use since 2004 but was only used by the B2B sales teams in the regional markets. Gradually the need grew for a more extensive system with more possibilities and the necessary flexibility.

We could not carry on extending the old system", explains Benny Menten, Manager Customer & Marketing Services at Concentra. "Customer knowledge is nonetheless becoming increasingly important but we could no longer follow the changes in the market by integrating new possibilities in the existing application. The tool was above all focused on internal processing procedures and too little on customers and markets."

An extra source of motivation for the CRM project was the outdated customer database. "Without a postal address we were unable to register a customer in the database", explains Benny Menten. "As a result separate 'mini islands' emerged with contact details, such as for online actions for example. The CRM project was therefore also the ideal opportunity to thoroughly tackle the issue of the customer database."

Thorough preparation with blueprint

To increase the chance of success, Concentra first wanted to thoroughly analyse the CRM needs and make a blueprint. "We spoke to several consultancy firms and looked at their approach", recalls Benny Menten. "Travi@ta - just as we did - had a broader perception of CRM than purely as an application. In addition they have a lot of in-house knowledge in the area of CRM as well as a clear vision on ROI and they were able to present references in the media sector. Their Microsoft Gold Certified Partner label inspired confidence, and they anticipated our demand for knowledge transfer. For this reason, we decided to choose Travi@ta as partner in the elaboration of the blueprint."

The blueprint was a very thorough preparation and became the basis for the Concentra CRM project. "We interviewed every manager and also a large number of end users - around 50 people in total - on the subject of CRM business needs", explains Benny Menten. "We started out from these business needs, without already making a decision



regarding CRM products and suppliers."

CRM as an attitude

By working that thoroughly, Concentra wanted to ensure that the new CRM system would grow

into much more than just a software tool. "For us, CRM is an attitude", states Benny Menten. "Investing in software is pointless if not everyone cooperates in sharing and applying their customer knowledge so as to broaden customer know-

ledge and bring about additional sales."

Only after the blueprint was complete did Concentra focus on the budget, approach and project orga-

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Marketing department and sales representatives Corelio Advertising work more goal-oriented thanks to well-organised client information

Corelio Advertising wanted a new CRM system as a support for the advertisement sale. The marketing department wanted a more goal-oriented communication with their target groups and sales people had to be able to work more efficiently by having more client information. Corelio implemented Microsoft Dynamics CRM together with Travi@ta, expert in the field.

With Microsoft Dynamics CRM, sales people obtained a well-organised history of every client. After every client visit, they enter the relevant information. Through integration with other company software, sales people see at a single glance which turnover the client is achieving or which advert he is placing in the Corelio group's publications. The marketing department now has one large database from which they can select to conduct marketing campaigns. Starting up marketing activities, sending out mailings, ensuring their follow-up; it is much smoother because everything is contained in one package. Administration also gets access to Microsoft Dynamics CRM. Order processors are able to consult their orders there. Calling to and fro with sales people looking for addresses or details of contact persons is no longer necessary.

Right before media group Corelio came into existence, predecessor VUM chalked the plans for a new



CRM system as support for advertisement sales. The marketing department wanted to be able to communicate more goal-oriented with target groups and sales people had to be able to work more efficiently by having more client information. At that moment, the Passe-Partout department was starting up a similar CRM project. Independently of each other, both departments decided to go for Microsoft Dynamics CRM. So it's only logical that Corelio Advertising opts for Microsoft as its supplier for its new CRM application.

"First of all, CRM must support the sales & marketing department at Corelio Advertising. It consists of five divisions who previously worked separately: Corelio Connect is re-

sponsible for the internal direction and organises the sale of themed advertising in newspapers of the Corelio group. Spotter sells advertising columns in our papers and free local papers, Jobat sells job vacancies, Passe-Partout sells regional advertising space and Passe-Partout Regie sells national advertising space. These departments worked with various CRM applications before, written themselves or not. A few didn't even have a CRM and kept client information in Access or Excel. Lots of information was only stored in the mailboxes of about three hundred sales people in total. In order to be able to cooperate better and work in a more integrated way, we wanted to have just one shared CRM system."

Making people available

Corelio looked at various possible CRM software packages and opted for Microsoft Dynamics CRM. Corelio: "Microsoft Dynamics CRM has very recognisable screens and offers what we were expecting. Some packages offered even more possibilities, but we didn't need these. They looked too difficult to implement and less user-friendly for the end user. Of all the partners we met, Travi@ta inspired confidence. Travi@ta was able to show us they had lots of experience having done so many implementations at other large companies. We are very satisfied with our cooperation: Travi@ta seems to have made a realistic estimation of the time the implementation would take. Nonetheless, our project was not that simple: tuning five departments to one another, all with their own back office and with different CRM applications."

The internal IT department ensured that the back office system was synchronised with Microsoft Dynamics CRM. Although the VUM as well as Passe-Partout had both opted for Microsoft Dynamics CRM, they first wanted to be sure whether the package would also be suitable for a larger organisation like Corelio Advertising. "That's why we drafted a first plan together with Travi@ta in February 2007", explains the Research & BI Manager. "We sat down and talked to the various divisions, people in charge as well as sales people. What did they expect

of the new CRM system and what was important to them? Most of the answers were in line with each other. Because the individual CRM projects for Passe-Partout and VUM were at an advanced stage already, there was not that much more work at the drawing table. We did have to adapt parts because our clients see multiple sales representatives, each with their own product. As standard, Microsoft Dynamics CRM works with one sales representative per client, called 'owner'. We also had to build in a separate safety for the quotes: we want to share all the information with all the departments, apart from the quotes. It is very important to make people available within the company and allocate them to the project. Travi@ta's pace was very high and more than once they suddenly needed lots of input from us. At moments like that, it's good to have people available to do this. Four of our people looked after the project, together with a group of key users who now have to develop the CRM further from their practical experience."

Within a few months, everyone at Corelio was working with Microsoft Dynamics CRM. Fifteen sales people within Corelio Connect started with it initially, the rest followed later. Passe-Partout had to transfer data from a different CRM system to Microsoft Dynamics CRM in an automated way.

Continued on next page

Case story Corelio

Open company culture

Sales people add all sorts of information after a client visit: which client and when they visited, which results this had, what was said, you name it. Via action management, they build a client history, which simplifies follow-up. Sales people can also see in a single glance in Microsoft Dynamics CRM which turnover the client is achieving, as the accounts are linked to the system too. They can click to see which advert the client placed in which publications of the Corelio group. If the client wants to see his last advert, the sales person will be able to find it in a few clicks of the mouse. Previously, he had to involve administration for this. Sales people can also see which mailings the client received. This gives them an overall picture of the client, which will help them with the sales talk and when they undertake further action. "That is very important. Corelio has coordinating products and offers advertisement packages: clients can combine advertisements for newspapers, free local papers and the internet. As a sales person, you really need to have an insight into the back office systems which are all connected to this."

With one common CRM database, sales people from the various divisions know from each other whether they visited a certain client, allowing them to allude to that if need be. Corelio has an open company culture and wants to leave all the information visible to all the sales people: addresses, contacts, a short report of a sales talk, the results of it, and so on. Only quotes are partly shielded. Even though Corelio is one group today, the divisions are partly competition to each other. Thanks to the integration with the media database CIM, Corelio has an overall picture of the publicity expenses per advertiser, including the figures of the competition.

More than a sales tool

The marketing department too enjoys the shared CRM database: "We now have one large B2B database where we can manage contacts and addresses centrally. This is of course an enormous advantage because we now have a much wider database to select from to conduct our marketing campaigns. Starting up marketing activities, sending out mailings, ensuring their follow-up; it all happens much smoother because everything is contained in one package. Through the integration with Microsoft Office Outlook, we can now also register e-mails in Microsoft Dynamics CRM. We can then immediately link them to a quote and file them there."

Administration also has access to Microsoft Dynamics CRM. Order processors are able to consult their orders there. Calling to and fro with sales people looking for addresses or details of contact persons is no longer necessary: everything is neatly entered in Microsoft Dynamics CRM. Management is able to follow up sales much more easily by quickly gaining a view of which campaigns have taken place, map the results and gather which visits lead to orders. "That is a nice extra, but that was not the reason why we implemented CRM. We do have the intention of building business intelligence on top of CRM later on. That will enable us to make simple client segmentations, map which campaigns work and which do not, you name it. Allowing us to use our information in a really structured way. But for now, that's still in the future."

Microsoft Dynamics CRM 2011 helps RMB to optimize sales and customer contacts

Régie Media Belge (RMB) is active in the commercial exploitation of media products. It imagines media and marketing solutions for advertisers and sells advertising space for mainly audiovisual media (television and radio), but also "new" media (internet). RMB is the second largest player in its category in French-speaking Belgium.

RMB must know every detail of the advertising chain in order to work as efficiently as possible internally and to provide optimal assistance to its clients. RMB wanted to improve the entire process both for its employees and its clients in order to strengthen relations with advertisers, media agencies and advertising agencies. A new CRM system with an unerring link to Outlook became necessary.

CRM-partner Travi@ta installed a beta version of Microsoft Dynamics CRM 2011 to replace the existing client database and the previous CRM, which is also linked to Outlook and Mediavillage, a web information platform for customers. Integration was also set up with their accounting system Microsoft Dynamics NAV and the planning application Maya (for reservation of advertising space). Users now have a faster, specific view of the relevant figures via a conveniently arranged, personal dashboard. Users can look up, add and correct relevant information more efficiently with Microsoft Dynamics CRM 2011.

The RMB employees hardly used their CRM application to manage clients and contacts. There was after all another client database as well as CRM and the synchronization between CRM and Microsoft Outlook was poor; appointments made in CRM were not always sent to Outlook. Data were copied from CRM and pasted into Outlook. RMB therefore decided to switch to Microsoft Dynamics CRM. CRM specialist Travi@ta installed a beta version of the brand-new CRM 2011, which comes onto the market in 2011. The scope: replace the current CRM software and the existing client database with Microsoft Dynamics CRM, ensure unerring synchronization between Outlook and CRM, integrate CRM into the web platform Mediavillage, integrate the details from the bookkeeping and the planning tool and ensure that e-mail marketing and sales actions can be controlled from CRM.

"Appointments made by our employees in CRM were not only partly visible in Outlook and vice versa. Working with two databases is not optimal either: you will have double the work if you have to change, delete or add your contact details. So something had to change," says Bruno Romain, General Secretary of RMB. "We wanted an application to which we could entrust all our information and with which the users enjoyed working. This also had to be linked to Mediavillage, our online application where our advertisers can consult figures or optimize their advertising plan. They must first register for this. This registration is now linked to CRM 2011. New contacts are included directly in the database and after logging in, CRM checks what information the user can access depending on his identity."

All necessary information on one screen

Travi@ta brought the data from



the CRM system, the bookkeeping system and the central planning database together in the new CRM application. This was necessary in order to get an overview per file based on all the figures. These details were previously spread over various databases. Travi@ta used Scribe, a special application for automatically migrating and integrating the existing CRM application into Microsoft Dynamics CRM.

"In order to display all relevant information on a client as quickly and conveniently as possible, each user now has a dashboard with details relevant for him," says Bruno Romain. "That was impossible with the previous CRM system, although it is very useful: whoever makes an appointment with a client must have all the figures. Via their dashboard, sales staff can now keep a constant eye on turnover and easily see their portfolio developing up to a very detailed level. But there's more: CRM automatically sends such information to the right person. If, for example, there is a problem with the budget, the seller will be informed of this. The users can also request such information themselves but they do appreciate us supplying it for them."

CRM is now also used to make specific market proposals to targeted customers and prospects. There was previously hardly any history on the

customers and the reporting also held no water. You can find the right contacts in a jiffy nowadays and send them a personal e-mail from CRM, in case of promotion campaigns for example.

Conscious choice for the latest version

Microsoft Dynamics CRM 2011 is not even on the market yet, so why did RMB consciously take up Travi@ta's proposal to start with a beta version as early as autumn 2010? "Firstly, CRM 2011 offers about 500 new functions compared to the previous version," says Wim Geukens, managing partner of Travi@ta. "The difference between Microsoft Dynamics CRM 4.0 and CRM 2011 is also greater than between all other versions. An audit trail that can save all changes per field is standard from now on and you will benefit from several advantages that already existed in Outlook, such as record preview, flagging for follow-up and quite a few personalization features via drag-and-drop menus. But moreover, CRM 2011 guarantees optimal synchronization with Microsoft Outlook, which was very important for RMB."

Travi@ta has already been working with the beta version of Microsoft CRM 2011 since 2009. Four people followed everything about CRM 2011 closely via courses and detailed reading and all Travi@ta employees have meanwhile been trained on this version.

Listening to the people on site

RMB learned from the past that the users must be entirely behind an application in order to succeed. "Right from the start of the project, we got employees involved who know the area through and through," says Anaïs Loits, Database Coordinator and CRM Project Leader at RMB. "They ask us objective questions, consult with their department and provide feedback. They will also help their colleagues during the final implementation: the 'train the trainer' concept."

Travi@ta proposed to work according to the SureStep methodology. This means that all project activities are carried out in six phases whereby the risks are limited and an on-time and on-budget delivery is ensured. "We very consciously opted for Microsoft CRM as our users are familiar with the look and feel," says Anaïs Loits. "We were staggered by Travi@ta's technical knowledge and approach. They made us a well-structured proposal, that was very coherent and to the point. Their proposal contained 17 pages whilst that of their competitor was 80 pages long. Travi@ta was also the only one that took the trouble to get to know our business and properly understand exactly what we wanted to achieve with CRM. With clients such as Concentra and Corelio, they are also very familiar with the media world. They also have always been open as to the possible risks that the choice for a beta version entails."

One step ahead of the competition

The installation of CRM was the first phase of a larger whole. In a second phase, Business Objects will be linked to CRM. RMB also wishes to get into segmentation marketing and may in the future install SharePoint for document management and better cooperation.

"The transversal structure ensures more openness to the advertisers. If one of us is busy with a radio spot for a certain client, the person responsible for TV will also be informed of this. This synergy enables us to provide a better service for our clients and also work more effectively internally: information is exchanged between departments much more effectively. We are convinced that this puts us a step ahead of the competition. We now have a very complete database from which we can reap the benefits for ourselves. We were immediately able to deliver the necessary details and figures for a recent objective research within the sector," concludes a clearly proud Bruno Romain. ■

Interview with Anaïs Loits

Continued from page 1

and its use on smartphones, Ipad,... On the other hand, we will continue to follow everything concerning the personalization of our CRM tool.

What is your CRM strategy?

CRM should be the central tool, the reference tool for all RMB collaborators, the centre of information for everything affecting the users directly. We have several databases, several business applications and also Business Objects for the statistics. The idea is to link Dynamics CRM with all these sources of information in order to have a single point of entry for the user.

Another major idea of this project is to continue the reflection which led to the reorganization of our company and reorganize it into our information system.

Being a collaborative tool for information sharing, Dynamics CRM should contribute to this transversality effort. Moreover, thanks to the briefing tool that is being developed, Dynamics will not only be a commercial tool: other departments will also use CRM to communicate and



"Travi@ta uses the SureStep methodology".

collaborate with each other. The will to have a coherent information system will be further strengthened by implementing SharePoint, integrated with Dynamics.

What will be the impact of your CRM implementation on productivity, turnover, ...

One year ago, we changed the structure of the company for a full transversality. However the information system had not really followed this reorganization. The

former CRM didn't allow us to share information efficiently. Dynamics will provide much better communication between departments, as well as a better synergy of sales strategy.

What would be your advice to new customers before implementing CRM?

To implement a system as complex as a CRM tool, we would strongly recommend to follow the SureStep methodology, like Travi@ta did. ■

Microsoft Dynamics CRM energizes the European Wind Energy Association (EWEA) and its members



The European Wind Energy Association (EWEA) is the voice of the wind industry, actively promoting the utilization of wind power in Europe and worldwide. The organization has over 650 members from nearly 60 countries, including manufacturers with a 90% share of the global wind power market, plus component suppliers, research institutes, national associations, contractors, electricity providers and finance and insurance companies. EWEA analyses, formulates and establishes policy positions for the wind industry on key issues, cooperating with industry and research institutions on a number of market development and technology research projects.

EWEA also organizes numerous events throughout the year: conferences, exhibitions, launches, seminars and workshops. They contribute to the exchange of international experience on policy, finance and technical developments, and showcase the latest technologies. Another major EWEA event is its conference and exhibition dedicated to offshore

wind energy, the previous edition of which attracted 4,850 participants and 260 exhibiting companies.

Numerous data sources

Managing memberships and marketing activities, mailings and events in an association like EWEA inevitably leads to complex processes, involving an intense collabora-

tion between departments internally and with external stakeholders.

In the past, ICT systems could not support those activities effectively. The main reason was that EWEA ended up with about 30 different data sources, ranging from tailor-made database applications and Microsoft Excel to a standard CRM application called Efficcy.

Simeon Holdship, IT Manager at EWEA: "When I joined EWEA in September 2009, it immediately became clear that our CRM system, Efficcy, was not doing the job and was running behind regarding user friendliness and system performance. This was causing a decentralized and scattered platform that lead to miscommunication and errors towards members which might harm these valuable relationships."

Search for a new CRM solution

EWEA realized that looking for a brand new centralized CRM system was the only solution. The association addressed various CRM solutions, including SAP CRM, Siebel, Salesforce and Microsoft Dynamics CRM. It appeared that this last solution offered the best value for EWEA.

"We were attracted by the familiar look and feel of Microsoft Dynamics CRM and how user friendly it was compared to all the other products we evaluated. We immediately felt confident with our CRM Partner Travi@ta to coordinate the analysis and implementation who impressed us with their professional attitude. They were also able to answer all our questions without any problem", says Simeon Holdship.

Structured implementation plan

From the start of the analysis phase of the new CRM system in March 2010, EWEA and Travi@ta decided to actively involve end users in the project by giving key users a demonstration of the functionalities of Microsoft Dynamics CRM right from the start.

This user involvement remained during the first phase of the project - the business analysis. Travi@ta gathered all the requirements from people in the different departments at EWEA: administration, finance, sales, communications, events, memberships and the policy department. Based on this input, Travi@ta presented a business analysis document which was again submitted for feedback by the different departments.

The next phase was a technical analysis, resulting in a document which was also reviewed by the various stakeholders at EWEA. After that, Travi@ta could start with the configurations and customizations. Finally, with the testing phase, the end users were given a demonstration of the customized solution by Travi@ta.

The new system went live on July 29th 2010, less than 6 months after the official kick-off of the project. Two employees from EWEA were trained through the Travi@ta Academy and then assigned to train the key users within EWEA. By its own initiative, EWEA continues to organize several follow-up internal training sessions, which are highly appreciated by the employees.

Simeon Holdship: "The new CRM system was easily accepted by

the end users. This had to do with their involvement right from the start, and of course with the look and feel of Microsoft Dynamics CRM, which is very similar to Microsoft Outlook."

Events and mailings

EWEA annually sends out millions of e-mailings. Efficiently managing contact information, prospects and distribution lists was a primary requirement for the new CRM system. Being able to analyse reading and click through behavior on e-mails now enables EWEA to initiate more efficient campaigns, and even to adjust ongoing campaigns.

A great deal of attention also went to event management, as EWEA organizes numerous conferences, exhibitions, launches, seminars and workshops each year. In order to address the specific needs of EWEA, like sponsor engagement and the possibility to assign booths of different sizes, Travi@ta tuned Microsoft Dynamics CRM to these needs. Today, Microsoft Dynamics CRM has also become a valuable instrument for post-event metrics regarding event participation rates and evaluations.

Association management

Another important element in EWEA business needs was association management.

Simeon Holdship: "Managing over 650 members means we needed a user friendly and reliable tool for managing prospects, but also member contracts and annual fees. Travi@ta understood our needs and was able to translate those requirements into Microsoft Dynamics CRM."

Return on investment

EWEA had to merge around 30 different data sources into one system, and was able to achieve this in only a few months with the help of Travi@ta. But the most important challenge was to make sure the employees also used the system on a daily basis. One by one and with the help of Travi@ta, the association managed to solve all the issues.

Simeon Holdship: "We are proud to say we have a CRM system that is really accepted by the employees. This is the basis for a great return on investment in the coming months and years."

"This CRM project has been essential to the success of EWEA as an association. That's why the management has actively supported it from start to end", adds Bruce Douglas, Chief Operating Officer at EWEA.

Looking towards tomorrow

EWEA is now already initializing new projects together with Travi@ta: the company started working on an integration of Microsoft Dynamics CRM with Winbooks, the financial system, to streamline invoicing and payment processes for memberships and event participations.

Another future initiative will consist in making CRM data available online through self-service applications, allowing people to access their membership details online, register for events, order publications, etc.

Simeon Holdship summarizes what he values in the long-term relationship with Travi@ta: "Both parties value this as a partnership, a relation of trust which continues to get stronger through the regular CRM steering committees we have together."

Microsoft Dynamics CRM 2011: Power your business productivity

Combine familiar Microsoft Office applications with powerful CRM software to improve marketing effectiveness, boost sales, and enrich customer service interactions through a familiar Microsoft Outlook experience which helps ensure rapid user adoption and fast results.

And with Microsoft Dynamics CRM Online, you get the same

powerful CRM software delivered as a cloud service from Microsoft, enabling instant-on anywhere access and predictable pay as you go pricing.

Microsoft Dynamics CRM 2011 delivers "The Power of Productivity" through familiar, intelligent and connected experiences:

Familiar: CRM that is Natural and Personal

Native Microsoft Outlook client, key Office features like mail

merge and Microsoft Excel export/import, 360-degree customer view, role-based forms and personal views, drag-and-drop customization and intuitive developer tools.

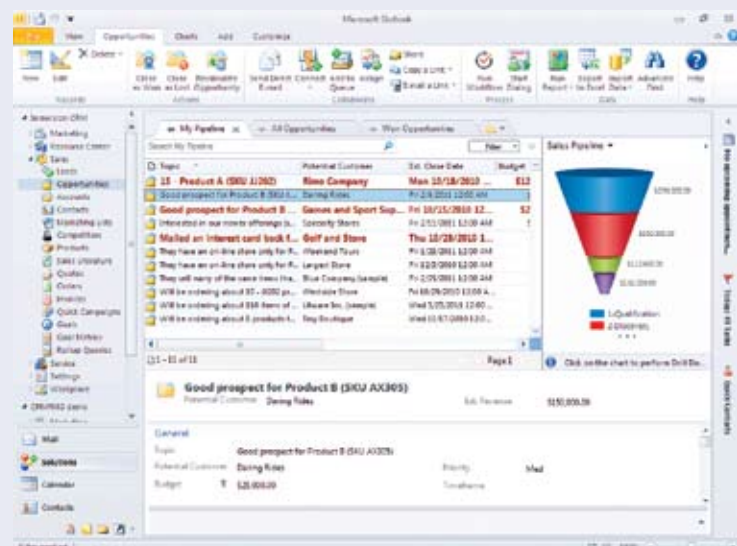
Intelligent: Information that is insightful and actionable

Out-of-the box or configurable real-time dashboards and powerful inline data visualization, guided dialogs and flexible workflows, intuitive segmentation tools, condi-

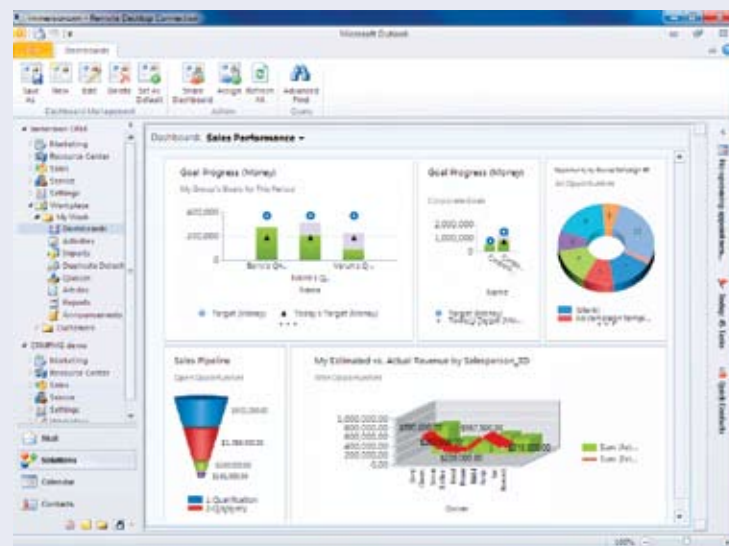
tional formatting rules and powerful reporting features.

Connected: An Organization that is Collaborative and United

Integrated document management and versioning, team record ownership, comprehensive queues, and real-time communication tools, Social Connector and robust portal solutions.



"Opportunities & pipeline in Outlook".



"Real-time personalized Dashboards".



European Foundation Centre uses Microsoft Dynamics CRM for efficient member and event management

International organisations and federations encounter lots of obstacles when they want to operate outside their own country's borders. The lack of a uniform international legal and fiscal framework is very often an impediment.

The European Foundation Centre (EFC) was established in 1989 as an internationally active non-profit organisation whose mission it is to bring together and support other federations and member organisations internationally. EFC has about 250 members and counts 30 to 40 staff. The organisation undertakes several initiatives in order to stimulate networking amongst the members. The annual AGA Conference is attended by roughly 700 participants.

Gonzague Huybrechts, ICT Officer at EFC: "Our main concern is to get to know our members as well as possible: that way we'll be able to help them and bring them into contact with partners and other organisations. Within our own organisation we have to take into account a considerable turnover of temporary staff, volunteers and trainees."

From dozens of databases to 1 central CRM system

In the past, every member of staff at EFC worked with his own files, often in Access or Excel. Throughout the years, the number of databases at EFC kept growing. A proactive member management was out of the question, whilst the quality of the details left much to be desired.

"A centralised and well-structured member management was an absolute requirement. We decided to migrate to a CRM solution, so that all the knowledge our staff have about the members could be put into

the system.", Gonzague Huybrechts states.

Luckily, as a non-profit organisation EFC could count on the financial support from a certain number of foundations, like the C.S. Mott foundation. Microsoft Dynamics CRM Gold Partner Travi@ta was able to convince EFC to take the plunge. Gonzague Huybrechts: "Travi@ta was familiar with the specific issues of member organisations and had brought many a CRM implementation in the sector to a good end. The Microsoft Dynamics CRM platform was very appealing because of its user-friendliness, important to us as we work with a lot of temporary staff."

Detailed contact information

Travi@ta conducted a thorough analysis and asked after the information EFC wanted to know about every member. As a result, the standard company profile in Microsoft Dynamics CRM was adapted by Travi@ta with a substantial number of extra criteria. At organisational level, it was made possible to register additional information about the history, the activity domains and the financial profile of every member.

At the level of the individual contact person the contact information was scrutinized meticulously as well. For instance, EFC wanted to register information about political activities and which events were attended. And because EFC sends out 75 to 100,000 mailings every year to carefully selected target groups, every contact person should have a detailed list of all the mailings he has received.

Follow up of payments

Even a non-profit organisation benefits from a good financial follow up. Today, Microsoft Dynamics CRM

is being deployed actively for the follow up of payment of the membership fees: on the contact file the staff member of EFC can see straight away whether or not the financial contribution was paid.

Event management

Every year, more than 1000 attendants come to an event organised by EFC, which requires a good follow up. Travi@ta implemented the necessary adjustments in Microsoft Dynamics CRM turning the system into a fully fledged tool for event management. This ranges from follow up of registrations and the number

of participants, to filing information about the speakers which speak at the events. Here too, Travi@ta provided EFC with a link to the online Ogone payment system so that also that part of the information ends up in CRM.

CRM integration via the website

EFC's ambitions are not limited to the implementation of the CRM itself. The organisation is already looking forward to the next ambitious project, i.e. the integration of Microsoft Dynamics CRM with EFC's website.

Gonzague Huybrechts: "The integration of Microsoft Dynamics CRM with the website offers many a possibility of optimising the service to the members and at the same time make the internal administration much more efficient."

In the short term, an extra module from Travi@ta will be installed which will also manage access rights and passwords for external members. Every member will automatically receive a user name and password which will allow him to gain access to specific details from the CRM system from the website.

"Every member will be able to view and amend his own profile information, but will also be able to register online for events. The advantage of the web integration is that all the access rights and the details entered via the website will be registered directly in Microsoft Dynamics CRM, which will decrease the administrative burden and the margin of error considerably", Gonzague Huybrechts states. Apart from that, Travi@ta is working on integration with Microsoft SharePoint and MS Dynamics CRM in order to offer members of EFC an online collaboration platform allowing them to work together for specific projects.

Return on investment in the short and long term

Looking back on the successful CRM implementation, Gonzague Huybrechts really appreciated the professional cooperation with Travi@ta: "The Travi@ta consultants were able to 'translate' our wishes immediately into concrete actions and paid a lot of attention to the knowledge transfer after the implementation. Other IT companies often speak fine words, but that's it."

The return on investment of the CRM implementation is situated on various levels. On the level of the database, the details are, due to the centralisation, much better protected in case of calamities. The confidentiality of the information is also guaranteed much better, due to an efficient management of the access rights of the users.

With day-to-day activities, like organising events, EFC is already booking a considerably time profit, while the CRM offers much more added value as a trusted source of information for analysis and follow up of payments and registrations.

In the future the "Return on Investment" will undoubtedly increase thanks to the access to the CRM details via EFC's website. ■

Travi@ta Support

Travi@ta provides professional remote and onsite support for your Microsoft CRM customized solution and add-ons by certified specialists.

The Service Level Agreements defined in our yearly support contracts guarantee an appropriate reaction time according to the nature of the problem. Customers have access to a secure internet portal where they can create and follow up their cases.

Every year, Travi@ta invests in the "Partner Advantage Business Solutions" (PABS) support contract, which is the most extensive support contract that Microsoft offers. It allows customers to benefit from Microsoft's third-line-support level and one hour guaranteed support incident response.



"Travi@ta's state-of-the-art support desk."

Hotel Concepts helps clients faster with intelligent company software



For the daily activity management, hotel software producer Hotel Concepts used no less than seven different software packages, each with their own information. Thanks to the transfer to Microsoft Dynamics CRM the company was able to gear the internal cooperation to one another. Nowadays, sales people enter all the information about their clients in the CRM database. They now also find the 280 products and links of Hotel Concepts' hotel software there. They used to be kept 'in the employees' heads'.

Via automated workflows in CRM, the sales people put their colleagues to work. As soon as the contracts are signed, the project manag-

ers receive an overview of the tasks to be done. Accountancy also knows straight away when invoicing can start.

The help desk assistants also use the software. Every customer contact generates a new ticket. In two years time, they already created 90,000 tickets. Tickets about complex problems with the hotel software are sent quickly to the development department. Clients receive an upgrade faster to tackle their problem. Thanks to the CRM reports, Hotel Concepts also knows which other clients with similar configurations need to implement the upgrade.

With the acquisition of Microsoft Dynamics CRM, hotel software supplier Hotel Concepts opted for a new technological approach to its company activities. "Our vari-

ous departments used no less than seven software programmes to manage day-to-day business", says Hotel Concepts' CEO Jan Teblich. "That's why we took a closer look at our company processes. By attuning a number of internal processes to one another, we wanted to prepare Hotel Concepts for a new phase of growth. With Microsoft Dynamics CRM we now all work in the same way and we find everything in one location. An absolute must for a micro multinational."

The life of a Hotel Concepts sales representative used to be quite simple: you could choose your own way of working and you never had to register any personal sales information. Unfortunately, teamwork was out of the question. All the information about clients and their projects were filed on personal computers or in little notebooks. With 1400 hotels, the client database, and the sales administration, kept on growing. Moreover, over the years Hotel Concepts' software had grown into a fully fledged programme with lots of options, and they were not catalogued.

For Jan Teblich the decision for Microsoft Dynamics was easily made. "I am not an IT specialist myself, I am an economist. And from experience I know that the threshold for Microsoft is low. Moreover, with CRM-specialist Travi@ta we had a Microsoft-partner who knows CRM like the back of their hand. They tailored Microsoft Dynamics CRM completely to our needs, in such a way that all the departments use the software."

Sales people start off company process in CRM

Today, all Hotel Concepts' sales representatives enter all their contacts and meetings straight into CRM. Travi@ta ensured that all the products and 280 products and links for the hotel software are contained in the CRM database. Sales people can now simply follow up on the his-

tory of a client or prospect. When they finally manage to secure the client, the signing of the contract automatically starts off the creation of a new project. Thanks to the clear list of options, the person responsible for the project knows exactly what the new client needs. All the options are separate project deliverables and receive a certain delivery term.

Clients can opt, for example, to integrate their software with their telephone exchange. Based on the chosen options, Hotel Concepts' project manager looks which technical advisor is available and plans it in via the CRM scheduler. The advisors install and configure the technology and provide user training.

Signing the contract also triggers the invoicing. "Projects are invoiced in three parts: at the start, the first installation and the final delivery", says Teblich. "Our CRM software now knows when a new invoice can be sent out. For now, the invoices themselves are drafted in our accountancy package, and there is no integration yet with Dynamics CRM. We want to change this in the future."

Help desk first to start with CRM

One of our biggest points of attention with Hotel Concepts is the user support. "One of our Dutch clients has around 350 check-outs every day around 3pm: if there is a problem with the software, this would be a drama", says Jan Teblich. "Our after-sales service is very important. Our help desks in Atlanta and Breda each take care of twelve hours. They were the first to start using the CRM software. Our help desk assistants create a new ticket in CRM for every client contact. If they can help the client over the phone, they also close the ticket straight away. With problems which could possibly mean a financial impact, they quickly transfer the tickets to their colleagues for second or third line support."

Some clients ask the help desk

for amendments to the Hotel Concepts' software. They are put automatically in a waiting list in CRM and are discussed weekly in a special advice council. They decide whether Hotel Concepts will develop the extra functions for the client. The head of the development department consults the list every week and organises the planning according to priority with the help of Microsoft Dynamics CRM. After an change request has been executed, he notifies software. After about 150 amendments Hotel Concepts publishes a new upgrade, although urgent and general problems can also lead to a new upgrade straight away.

Thanks to the online access to CRM, the help desk assistants can work at home during their on-call weekend. They can also follow up whether their colleagues on the other side of the ocean received a call during the night from one of their own clients. When the client calls back in the morning, they know straight away what it's all about and they can help them quickly.

Already 90,000 tickets in CRM

The help desk assistants have already created 90,000 tickets in CRM. The hotel software is easy to use, but it contains many company processes of the hotel system. For the new receptionist, who only started two days ago, it's not that easy. Hence so many calls. Thanks to Microsoft Dynamics CRM Hotel Concepts can follow up the calls without any problem.

Hotel Concepts was able to do this with the previous team software as well, knows Teblich, but that was it: "The integration and cooperation with our programming team wasn't there. It allows us to react more quickly to our customer's problems. Moreover, we can also make connections; the CRM reports allow us to see if a certain problem with a telephone exchange could happen to another client with the same configuration. That way, we can tackle problems in similar situations before they actually happen."

Sister company now also works with Microsoft Dynamics CRM

Thanks to CRM, management and sales representatives now have a much better overview of the activities. "The sales manager in America had no idea of our activities here", says Teblich. "Now, he can for instance re-use configurations which could be interesting for his prospects. And of course, this saves a considerable amount of time. New employees can get started faster because the company and the company processes are more transparent."

On balance, management now has better steering systems and among others it is very satisfied with the sales forecasts. "They help us to plan better. We are satisfied in such a way that we have also installed Microsoft Dynamics CRM at our sister company Brilliant Software, who was working with salesforce.com. There is always some initial resistance with a migration project, but our employees soon realised what the benefits of it were."

Professional Services Automation add-on available for CRM 2011

With numerous customers active in professional services, consulting and software development, Travi@ta is happy to announce the availability of this vertical solution for Dynamics CRM 2011, called PSA.

PSA is the xRM solution for professional service organizations, developed for the new generation of information workers, who are always online and work wherever and whenever they wish. The application is easy and user-friendly. It links to your calendar, allowing you to create projects, make budgets, schedules and hour entries and to deal with your resource planning in your familiar Outlook environment.

From Opportunity to Project

Marketing campaigns, mailings, turning leads into opportunities

are standard CRM functionalities, but PSA goes beyond. It allows you to turn opportunities into projects, calculate your hours and plan your projects, all with a single mouse click.

Time registration integrated with Microsoft Outlook

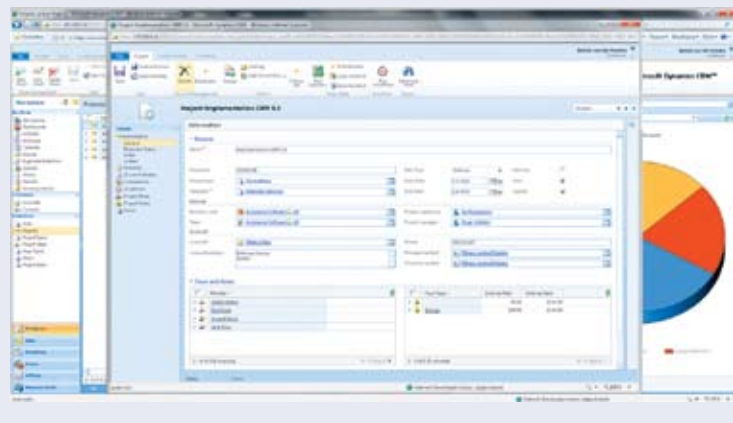
Time registration is very easy with PSA: enter your appointments from Outlook and your hours are registered. But it does not end there. Resource planning is also integrated with your Outlook environment.

Expense registration

You can book not only your hours to your projects, but your expenses as well. The integration with workflows makes it child's play.

Invoice your projects with a single mouse click

With a single click of the mouse you can generate invoices that are ready for your financial department.



Case story Concentra
Continued from page 6

nisation. After this the desired application and partner were selected based on criteria such as functionality, user-friendliness, integration possibilities, cost price and flexibility. As a result of this, Microsoft CRM Dynamics emerged as the best solution. Partner selection took place based on the vision, financial strength, project cooperation, size (not too large and not too small), local representation, partner network, number of available specialists and training possibilities. Travi@ta had already scored highly in the blueprint phase, and at this later stage was also the most suitable partner to manage the project.

Quick win

"We worked – and still do – in phases", explains Marc Cox, who is in charge of the CRM project at Concentra. "Due to the fact that the salespeople who called on the newsagents and chains still had no tools, they were the first project group. In this way we were quickly able to achieve a clear result – it was thus what is known as a quick win."

The retailers had previously had no way of structurally managing their customer relations. The specific needs were thoroughly analysed with the maximum possible input from end users.



"At first we worked on the creation of a broad base on all levels", states Benny Menten. "By involving not only managers and IT administrators but also end users in the CRM project, you increase acceptance."

Retailers have been using Microsoft Dynamics CRM since June 2008. "The system is used intensi-

vely and is now considered essential", Marc Cox tells us. "End users are very quickly able to find information regarding their customers and if necessary can take over a colleague's region. The customer data are centrally recorded in a structured way. The integration with the print management backend system is very useful. If for example a newspaper seller goes on holiday, print and distribution is adapted based on the information that the seller enters into the CRM. Integration also works in the opposite direction. If a store sells a lot less or a lot more of our newspapers, that is detected in the backend, whereupon the seller receives an automatic e-mail so that they can react to the situation. Thanks to these workflows we are able to set up a number of 'flashing light indicators' so that we can react in a very alert manner and direct every movement in the market."

Master database

After the first success with the retailers, Concentra decided to not only use CRM as a database for contact registration, but also to set it up as a central database - the 'master database'. For this purpose, a lot of technical adjustments had to be made by Travi@ta and Concentra's own IT department. "The central database was ready in April 2009", Marc Cox explains. "Since then around 230 users have been able to search for the customer information

relevant to them via the CRM. The transition took place without any difficulties."

The new database contained around 600,000 customer contacts, both consumers and companies from the beginning, and it is integrated with all backend systems. "Sales, marketing, customer services, finance, etc., all search for their customers in MS CRM", explains Marc Cox. "In addition, all changes to customer information take place directly in the CRM, to avoid any one customer being present in different databases."

Marketing campaign analysis

As a third phase in the project, the readers market came under the microscope, whereby direct marketing, marketing projects and actions and sponsoring & events were looked into in detail.

"Our marketing employees can now use CRM from the setting up of a campaign to its analysis", Benny Menten tells us. "We are now better able to analyse which campaigns fare the best with which target groups. With this knowledge we can increase the chances of success for new campaigns. Communication between the various departments is also much smoother than before. Follow-up of campaign response is facilitated via automatic visualisations in MS CRM."

Improved customer service

Another result is that Concentra is better able to respond to the needs and questions of consumers. If someone reacts to an e-mail and calls customer service, employees are immediately aware what it is about. "We can respond in a more directed fashion and offer improved service", explains Benny Menten. "In so doing we build up a better relationship with our subscribers. This also helps us to sell more. Event-driven marketing is essential in this: making the right offer at the right time to the right person using the right channel."

For the final phase of the CRM project, it will be the other B2B sales teams' turn. They still work with another sales tool. The aim is to register customer contacts, exchange opportunities and link offers, fill in account plans, etc. In short, to develop customer information in a structured way and apply it in order to be more successful in their relationships with customers in the various markets.

In the meantime the CRM Master Database has grown and now contains around 1 million B2C contacts and 200,000 B2B customers.

"In any event we made a good choice with Microsoft Dynamics CRM. We can already see a lot of useful new possibilities in the 2011 version. In the longer term we will make the switch to Dynamics CRM 2011", Benny Menten concludes. ■

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