

Hitachi Solutions designs and delivers new Customer Relationship Management solution (CRM) to help a charity coordinate and manage contact with key stakeholders



JRF JOSEPH ROWNTREE FOUNDATION

The Joseph Rowntree Foundation (JRF) is an endowed foundation that funds a large, UK-wide research and development programme to understand the root causes of social problems, identify ways of overcoming them, and show how social needs can be met in practice.

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Julia Lewis, Communications Director, JRF

Business Challenge

JRF had identified a need to have a more systematic way of managing information on its stakeholder contacts and had decided to implement a Customer Relationship Management System (CRM). Prior to the implementation JRF’s contact data (over 29,000 records) was stored in numerous fragmented sources – records were stored in a project administration application, 5,000 records in Outlook, a significant number of records in its Event Team’s Access database, as well as further contacts in Excel and a number of other disparate data stores.

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Not only was contact information often duplicated, but the content was inconsistent and the Foundation was struggling with process and ownership issues.

Linda Meadows, Knowledge Management Consultant, JRF commented, “We had decided to move away from mass mailing our key stakeholders to a more strategic and targeted approach. We needed the new CRM to drive this initiative. It would enable us to keep a record of all communications with our stakeholders and coordinate and manage contact more professionally.”

Following a comprehensive clean-up exercise JRF estimated that its consolidated contact information would be reduced to 10,000 records. It required a CRM system that would be intuitive to use, easily integrated with its existing systems such as Word and Outlook, and would overcome the following challenges:

- Contact data fragmented – no clear picture of interaction with contacts and difficult to find contact details
- Inconsistency of contact data – many records incomplete and inaccurate
- Classification fields inconsistent – retrieving records by specific search criteria very difficult
- No defined or standardised process for managing contacts
- Records of correspondence, communication and meetings with contacts fragmented and hard to cross reference

The Foundation selected Microsoft Dynamics. Linda Meadows, JRF commented, “We selected Microsoft Dynamics primarily because of its ease of integration with our existing products and because its interface is familiar to our users. As a charity we get a discount from Microsoft so price also influenced our decision.” Hitachi Solutions was invited to tender for the project and was delighted to be awarded the contract.

The Solution

Hitachi Solutions has a proven track record of delivering complex CRM solutions based on Microsoft Dynamics. With a dedicated Dynamics Practice and consultants with experience working in the charitable sector, Hitachi Solutions was perfectly positioned to implement a solution that met JRF’s requirements, budget and timescale.

Hitachi Solutions delivered JRF’s CRM solution using its Consensus Toolset – a comprehensive framework of tools and processes that has been developed from best practice principles and refined over years of successful implementations.

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Scope of solution

- Requirements gathering
- Scope agreement
- Solution design
- Design of architectural framework
- Data migration
- Implementation
- User acceptance testing
- Training and handover

Hitachi Solutions completed a workshop-led inception phase with Foundation staff. This enabled its consultants to ensure that Microsoft Dynamics was a high-level fit, that they fully understood the key business drivers and time dependencies, as well as any risks that might affect the project. Following completion of this phase Hitachi Solutions devised a comprehensive project plan that mitigated the risks and met the client's objectives, timelines and budget.

Julia Lewis, JRF commented, "Hitachi Solutions' consultants expert knowledge of the Dynamics technology was extremely helpful, especially when it came to re designing our event module. Rather than produce a solution that our event team had to adapt to, they took the team's processes into consideration and designed an automated solution to meet their needs. In my experience this kind of capability and flexibility is very unusual."

Despite the fact the client's Project Manager was absent for the last two critical weeks of the implementation, Hitachi Solutions' consultants completed the project within the proposed timescales and under budget.

Linda Meadows, JRF commented, "If ever there's a tribute to the skills and professionalism of Hitachi Solutions' consultants it's the fact that in the end they had to adapt to the absence of the project manager at a crucial time in the project and they still managed to deliver on time under these challenging circumstances."

Following completion of the CRM solution Hitachi Solutions delivered training to JRF's key users and provided them with support material to assist in the roll-out of training to users going forward.

JRF's new CRM is robust and functionally rich and facilitates the Foundation's need to share important information on its key stakeholders.

Julia Lewis commented, "Research managers were very quick to adopt the CRM and immediately used it to record notes from meetings with stakeholders and notify colleagues that new information was available using the short cut email function. This was a real quick win for us! We can easily access the history and activity for each stakeholder or their organisation before contacting them which makes us far more efficient and professional. It's still early days and there's a lot of untapped potential in the system, but we're extremely happy with the solution Hitachi Solutions has delivered and the relationship we have developed with them."

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Why Hitachi Solutions

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's calibre of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts.

Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.