

Improving customer service with Microsoft CRM



The specially tailored CRM software linked Grosvenor seamlessly to the existing property database

About Grosvenor

Grosvenor is a group of privately-owned international property development, investment and fund management businesses. The group manages property assets worth £12.9 billion. The company's origins lie in the central London landholding of the Grosvenor family, dating back to 1677, and family values – with a tradition of customer service – underpin the way the business operates today.

Business Situation

Grosvenor is in the process of a major service transformation programme. The company's objective is to move from an asset-centric to a customer-centric way of doing business. Historically, Grosvenor had a very good property and accounting database for legal and billing activities. However, when it came to dealing with people – tenants, owners, employees and contractors – they did not have a 'single view' of business activity or the stakeholders involved. There was a lot of information, but no central place to store it.

This meant that the company's staff did not always have the most up-to-date contact details for customers. A customer, who might have several properties under management by Grosvenor, would expect to talk to the same person about their full portfolio at any time. From the Grosvenor side this was not possible, because the systems did not link individuals back to all the properties they owned.

To get a single view of the customer and all the relationships they have, Grosvenor needed a customer relationship management (CRM) programme, but one beyond an off-the-shelf approach. They needed to record information about everyone they dealt with and link that information back to the property database.

The Solution

Grosvenor chose to work with Avanade because of their professional and painstaking approach to the problem. Grosvenor was confident that Avanade would implement a system which reflected how the company operated. This attention to detail would help to ensure the greatest possible use of the system, by meeting users' needs and reflecting their working processes.

Working with the client, Avanade produced a detailed project definition. This helped to refine the specification and ensure that it delivered everything the business needed.

Their recommendation was a solution based on Microsoft Dynamics™ CRM 4.0, with Grosvenor-specific modifications. Avanade proposed to tailor the CRM software, so that it kept track of all the details and types of people that Grosvenor dealt with and to ensure that it linked seamlessly to the existing property database. In particular, this required adding the concept of a property lease to CRM, so Grosvenor could relate different leases to different contacts.

Grosvenor already uses Microsoft® CRM 3.0 on a global basis, so the IT team in London was familiar with the software. However, the power of the latest version, Microsoft Dynamics CRM 4.0, made it particularly attractive for this project. Avanade was able to demonstrate that it would be more flexible, more easily tailored to their requirements and easier to use than the previous version.

Results

The deployment of the solution allows more than 200 users have access to the system via Microsoft Office Outlook®. A number of external partners have access to a limited read-only version through a web interface. By using Active Directory® and CRM's own security rules, Avanade was able to ensure that users could only see and edit what they were meant to.

At the time of writing, the new CRM system has only been running for a short while. However, Grosvenor is confident that it will bring about a number of important business benefits, including:

- An easy-to-use, familiar interface, integrated into Microsoft Outlook
- Seamless integration with existing back-office systems
- A customised version of Microsoft Dynamics CRM, which matches Grosvenor's current practices
- The ability to share – securely – relevant information with 3rd parties via a web-based portal
- A single, integrated view of Grosvenor's customers ensures that everyone in the company has access to the same, up-to-date information

This single, integrated view of Grosvenor's customers is critical to the company's people-focused business transformation. It reduces the chance that things will fall through the cracks and ensures that staff can be more responsive to customers' needs.

"They [Avanade] really got to grip with the details; they really understood the requirements, which were complicated and detailed."

"The project status throughout the project has always been green. Avanade have done a great job with development and project management and it's been a very efficient, well run, successful project."

"We operate at the top end of the market and people expect good quality service. Avanade helped Grosvenor deliver more value and better service. For a company that is proud of its traditions, its know-how and its professionalism, it is vital to give customers the best possible service and the only way to do that is by really understanding everything about them. This is exactly what Avanade has helped Grosvenor do."

Heidi Leroy-Short
Head of Projects and Process
Grosvenor



About Avanade

Avanade provides business technology services that connect insight, innovation and expertise in Microsoft® technologies to help customers realize results. Avanade's services and solutions help improve performance, productivity and sales for organizations in all industries. Additional information can be found at www.avanade.com.

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