



Microsoft Dynamics Customer Solution Case Study



Overview

Country or Region: Australia

Industry: Shipping

Customer Profile

The Port of Brisbane Corporation (PBC) is a government-owned enterprise that operates Australia's third-busiest port and employs about 280 people. PBC generated revenue of A\$282.4 million in 2005–06.

Business Situation

PBC used a system that could not capture the organization's multitude of internal and customer contacts. It wanted a CRM system that would centralize information and enhance relationships with partners, customers and suppliers.

Solution

PBC implemented Microsoft Dynamics CRM 3.0 and a custom component for Microsoft Office Outlook developed by its technology partner, Brightfox.

Benefits

- Ease of use.
- Simple and effective customization.
- Enhanced customer relationships.
- Integration with email and office software.
- Automated marketing campaigns.



Handling the boom times at Brisbane's port with Microsoft CRM

“Microsoft CRM extends the reach of Microsoft Outlook by turning it into a tool to manage customer information. It puts customer details, contacts and marketing pitches into one central location.”

Debbie Hilton, Business Systems Analyst, Port of Brisbane Corporation

One of Australia's busiest container ports in Brisbane, the country's fastest growing city, was struggling to cope with the customer service demands of being a boom business in boom times. The Port of Brisbane Corporation (PBC), charged with running some of Australia's major shipping infrastructure, needed a more efficient way to build and maintain its diverse and burgeoning customer relationships. It chose Microsoft Dynamics CRM 3.0. PBC worked with its technology partner Brightfox to create a centralized repository of customer data that sits neatly alongside the Microsoft Office system. From Microsoft Office Outlook, employees can access Microsoft CRM sales, marketing and customer service modules to make decisions, market products, solve problems and access strategic views of PBC's business.



“By centralizing core, customer-centric information such as after-hours contacts, disaster recovery and security, we can identify opportunities and problems at a glance.”

Heidi Monsour, PBC Manager Marketing Services

Situation

Australia has prospered in recent years from the worldwide boom in resources such as coal, iron ore and natural gas. The prosperity resulting from this boom has made Brisbane, the capital of Queensland, the country's fastest growing city.

Brisbane's port is one of the busiest in the southern hemisphere. This vital piece of national infrastructure is administered by the Port of Brisbane Corporation (PBC), a publicly owned entity that operates on a commercial basis to improve the economic performance of Queensland and Australia.

PBC's primary role is to facilitate trade growth by making the Port of Brisbane efficient and customer-focused.

PBC also provides and maintains port infrastructure and facilities (31 operating berths and more than 7,700 metres (25,262 feet) of quayline); operates the Brisbane Multimodal Terminal (BMT) – the interface between rail, road and the container terminals at the port; leases and manages more than 1,780 hectares (4,400 acres) of land for port-related purposes; acts as a manager for assessing and approving developments on port land; maintains navigable access to the port for commercial shipping; manages four boat harbors; and operates a visitors' center.

PBC employs about 280 people in a variety of professional, technical, trade and administrative roles. It has approximately 300 computers distributed across seven different workplaces, including the Port of Brisbane operations base, the BMT, the visitors' center, and the PBC corporate office in Brisbane's city center.

In the 2005–06 financial year, 2,618 ships carrying more than 766,000 containers moved through the Port of Brisbane. This

allowed PBC to generate revenue of A\$282.4 million – a 32.8 percent increase on the year prior.

The nature of its business requires PBC to maintain deep and multi-faceted relationships with its many and varied clients.

“With all our different divisions we have to share a lot of information with many individuals and organizations outside PBC,” says Heidi Monsour, PBC Manager Marketing Services.

“There are government contacts, shipping industry representatives, suppliers and contractors such as engineering and law firms, tenants of the port, businesses surrounding the port, the media and local community groups. The information we need to disseminate includes such things as trade reports, financial reports and invitations to events.

PBC's previous CRM system could not capture all PBC's internal and customer contracts. This affected its ability to monitor and develop relationships with partners, customers and suppliers and reduced its customer service capability.

“We had to make information sharing as easy as possible because there are about 2,500 companies and more than 8,000 contacts in our customer relationship management system,” says Monsour. “We have to keep these people – especially our neighbors – up to date with everything that is happening around the port, whether it affects them directly or not.”

Debbie Hilton, PBC Business Systems Analyst, says the biggest issue PBC had with the CRM system was that it did not integrate well with the corporation's email.

PBC wanted a solution that would improve its customer focus by centralizing customer information, such as after-hours contacts, disaster recovery procedures and security details. It wanted to be able to update information for publication automatically and create automated campaigns, such as email marketing, to save time.

“We realized that staff were not using our customer database system because it was difficult,” says Monsour. “We needed a CRM system with much more functionality that was easy for our staff to use.”

Solution

With assistance from its technology partner Brightfox, PBC evaluated three major CRM systems that suited its business. After four months of analysis, PBC implemented Microsoft Dynamics CRM 3.0 and a custom component for Microsoft Office Outlook.

Microsoft Dynamics CRM provides the tools and capabilities that organizations need to create and easily maintain a clear picture of customers, from first contact through to purchase and post-sales. With modules for sales, marketing, and customer service, Microsoft Dynamics CRM drives consistent, measurable improvements in business processes, enabling closer relationships with customers and improving profitability.

Cameron Black, Managing Director of Brightfox, says his company was able to create a high level of customization in Microsoft CRM to meet PBC's requirements.

“With Microsoft Dynamics CRM you get an Outlook toolbar,” says Black. “We built some additional functionality into this toolbar, such as a bulk email function so PBC could group contacts in marketing lists and send out email campaigns directly from Outlook.

“But the key to the success of the project was being able to identify PBC's needs and scope the necessary work. This is where most CRM projects fail: because they don't get scoped correctly. As a software developer, and not just a systems integrator, we were able to play a role in enhancing Outlook to meet PBC's individual requirements.”

After a short period of testing, Microsoft Dynamics CRM 3.0 was deployed to 80 PCs throughout PBC.

Benefits

PBC says its new Microsoft CRM system provided a central repository for all customer contact activities that integrated easily with existing software; met its budget and timeline; was easily customized to fit its needs; and is simple to use.

Ease of use

Hilton says that because the new CRM system integrates so well with PBC's email system, staff have taken to it very quickly.

“Our staff are comfortable using Microsoft products such as Outlook and now they can send an email to a contact and be able track it into our CRM system without any hassle.

“Since this function is now built into our Outlook infrastructure, it's just so simple to use. We have also reduced our training overload because we don't have to teach people how to navigate a totally new system.”

Simple and effective customization

Microsoft Dynamics CRM 3.0 was easily customized to suit PBC's business workflow. Working with Brightfox, PBC was able to add custom objects and activities, design custom views for different users and build business logic into its CRM system. This has allowed it to automate repetitive tasks, saving time and giving customers a better experience in all their dealings with the corporation.

“With Brightfox, we were able to tailor Microsoft CRM to our needs with very little trouble,” says Hilton. “We can design custom application views for different users and modify forms, data fields and relationships without writing a single line of code. This saves us a lot of time.”

Enhanced customer relationships

Microsoft Dynamics CRM 3.0 gives PBC a centralized database that is accessible to the entire corporation. Staff can now use the CRM system to track PBC’s many suppliers, customers and prospects.

“By centralizing core, customer-centric information such as after-hours contacts, disaster recovery and security, we can identify opportunities and problems at a glance,” says Monsour.

“We wanted integration and user acceptance with our new CRM. By that measure we are very happy. No-one has told us they miss the old system.”

Integration with email and office software

The tight integration of Microsoft Dynamics CRM 3.0 with the Microsoft Office system and Office Outlook allows PBC employees to easily pull information from its new CRM system into Office applications such as Microsoft Office Excel spreadsheets and Microsoft Office Word documents.

Hilton says this turns Microsoft Office Outlook into the one place where PBC staff can manage both customer data and communications.

“Microsoft CRM extends the reach of Microsoft Outlook by turning it into a tool to manage customer information,” she says. “It puts customer details, contacts and

marketing pitches into one central location for our marketing staff.”

Automated marketing campaigns

The new CRM system includes a marketing automation module that makes it easy to build customer or lead lists, create targeted marketing campaigns, track their progress and follow up on their response. It also allows marketing staff at PBC to send email blasts to targeted lists and track their response.

“Brightfox spent some time devising a better way for us to send out bulk emails,” says Monsour. “They came up with a customization that appears as a simple button on peoples’ toolbars. It works perfectly for us. Now it’s easy for people to send out bulk emails. Before, this involved mail merging and other difficulties. It was a pain.”

For More Information

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For more information about Port of Brisbane Corporation products and services, call +61 7 3258 4888 or visit the Web site at: www.portbris.com.au

For more information about Brightfox products and services, call +61 7 3233 1300 or visit the Web site at: www.brightfox.com.au

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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Hardware

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