



Overview

Country: Finland

Industry: Consultancy

Customer Profile

Finpro is a management consultancy based in Finland. It employs 300 experts that specialize in delivering quality client services to help companies achieve global success.

Business Situation

Finpro needed a customer relationship management system to improve the quality of its professional services, by providing fast and easy access to up-to-date customer information.

Solution

To improve the collaboration of customer data, Finpro decided to deploy Microsoft Dynamics™ CRM 3.0 in each of its 40 offices worldwide.

Benefits

- Customer management is simplified through cost-effective new system.
- User-friendly solution has adapted to how employees work with easy integration.
- Improved delivery of client services builds better business relationships.
- Increased detail in reporting creates clearer visibility of customer work.
- The environment is in line with the company's technology roadmap.

Finnish Consultancy Improves Customer Relationships with New Internal Solution

“Future integration with Microsoft CRM will help our employees work without limits—on the road or at the desk, online and offline, they’ll have comprehensive customer and services information.”

Aila Auvinen, CRM Project Manager, Finpro

Finpro is a leading management consultancy in Finland. It specializes in delivering quality customer services to help Finnish companies achieve global success. With 300 employees spread across 40 countries worldwide, the company needed to improve its customer relationship management. Employees needed to share information quickly to avoid duplicating workload by contacting the same customer about the same service more than once. Finpro worked with Microsoft® Gold Certified Partner WM-data and became one of the first organizations in the world to implement Microsoft Dynamics™ CRM 3.0. Faster access to customer details, and the ability to update information in real time across the group, has improved the quality of relationships between Finpro employees and customers Finpro’s client work. The new system is also helping the company develop better customer relationships.



Situation

Finnish consultancy Finpro helps local companies expand to achieve global success. Funded by service organizations and the Finnish government, it gives small and medium-sized enterprises access to high quality, comprehensive globalization services around the world.

Established in 1919, Finpro is now associated with more than 500 member companies, and has 3,000 customers from all industry sectors. It operates through a unique global network of 50 trade centers in 40 countries, as well as two local trade centers in Finland.

Aila Auvinen, Customer Relationship Management (CRM) Project Manager, Finpro, says: "We have five employees at each of our international locations. This created several business organization and internal communication challenges."

In particular, customer contact was not coordinated. The lack of an effective management system meant as many as five employees could contact the same customer to arrange meetings. The inability to share and update information lowered the quality of Finpro customer services.

"As we are a professional services organization this wasn't acceptable. We needed a new platform and communication tools to improve internal communication across our entire organization," says Auvinen.

Finpro offers its customers a range of consulting services to help with their strategy, market entry, market position building in an international environment. It also provides them with information and networking services, and innovation programs. The challenge lies in understanding clients' business opportunities in global markets and finding the right ways of market entry for

them. To achieve this, it is necessary to have a wide network of local partners in the international market.

Because Finpro is a relatively small organization with a network of worldwide offices, it is important for employees to maintain uniform working methods and an even quality of services. Auvinen says: "Our main object was to find a CRM solution that would improve the quality the work we do with our customers across the entire group."

Solution

Finpro was already using Microsoft Dynamics™ NAV 2.0 for its financial system, and Microsoft SQL Server™ 2005 for its database services, so it wanted the new solution to fully integrate with these systems.

The company evaluated several products on the market, but the offering from Microsoft Gold Certified Partner WM-data stood out as the best fit for Finpro. Auvinen says: "After thorough consideration, the WM-data proposal best matched our criteria for a high-quality, cost-effective system, with an effective delivery method."

In March 2006, Finpro began implementing Microsoft Dynamics CRM 3.0 to create a centralized store of customer data that could work with Microsoft Office and Microsoft Office Outlook®.

Petri Järvinen, Business Manager at WM-data, says: "Finpro was a pioneer in choosing to deploy Microsoft Dynamics CRM 3.0. This early adoption meant we had to quickly learn the new features and start implementation with the beta version. Microsoft provided us with a lot of information about the new version, and we were successful."

Because of the worldwide user base of the company, installing CRM Outlook for 300 mobile employees was a massive task.

Specification documents for the company were written in English and reviewed by several employees in different countries. The system consists of CRM Sales and Marketing modules, and the data models and forms have been completely configured to meet the business needs of Finpro.

Microsoft CRM required many hours of customization to fit the company's needs. But the installation on its client infrastructure by remote access worldwide was handled well due to detailed planning by both Finpro and WM-data.

The majority of users were first trained by a tailored Web-based game available on the company intranet. Since then key users at both Finpro and WM-data have been training employees in Helsinki.

Benefits

Since deploying Microsoft CRM, Finpro employees can share customer information more easily. Access to client details and meeting appointments in real time has improved the quality of client work and standard of professional services Finpro delivers.

Simplified Customer Management
Deployment of Microsoft CRM across the Finpro global network is now 90 percent complete. Employees have already quickly adapted to the new systems and are improving customer management. Auvinen says: "The initial employee response to the system was that it is very useful, and once everybody starts using it, it will be even better. With Microsoft CRM we've got a system that is cost effective and will make better use of our employees' time."

Employees no longer risk contacting the same client because the process has changed and become more efficient. Auvinen says: "Now, the first thing an analyst does

before dealing with a particular client is to collect information from our CRM system. This is where they can see the status of a project and any meetings that have been arranged. Employees can also easily update customer information as a job progresses for the knowledge of all our employees."

WM-data tailored and integrated Microsoft CRM into existing business applications at Finpro. And the system offers all employees the same overall picture of a customer regardless of where an employee is located. Customers are accessible from Microsoft Office Outlook and the Internet.

Järvinen says: "We also added on our custom-built CRM Audit Trail module to record and report how the employees are using the new system, and this will help us assess the system for development needs."

Easy-to-Use System Fits the Way Employees Work

From Microsoft Office Outlook, employees access Microsoft CRM customer service modules to make business decisions, solve problems, and get strategic views of the business for their customers. Petri Järvinen, Business Manager, WM-data says: "It's CRM that works very well—because it works the way users already do, and the way the Finpro business does."

Auvinen says: "Since we went live, new features and the integration are making our processes faster and easier than before. In January 2007, we will conduct a user survey and fully expect our employees to report substantial time savings. This is because the solution creates an efficient working environment for us, which results in more satisfied and successful customers."

Improved Delivery of Quality Services Strengthens Business Relationships

Employees spread across the Finpro global network are finding it easier to maintain uniform working methods. "We have improved communication across our organization and this has made us a more professional company," says Auvinen.

An employee can see if a colleague has recently been in touch with a customer, and therefore avoids duplicating work by calling a customer that has already been contacted. Employees can also create task lists for particular clients and put clients in groups according to their industry sector. Real-time access to this information makes this a reliable process. Microsoft CRM tools support employees to provide Finnish companies with better services to expand internationally.

Detailed Reporting Gives Greater Visibility Across the Business

Planning and managing client work in project teams is done at a higher standard now that employees' activities and meetings with clients are visible to all. Easy access to client information in the Microsoft CRM system creates a good basis for increasing the amount and quality of contacts between colleagues to discuss the best solutions for customers.

The CRM system is a good tool for supporting account management. All up-to-date customer details are seen globally rather than just in one particular region. Detailed reporting also helps employees identify the opportunities, trends, and problems that guide decisions for their customers.

Future Integration Planned for Technology Roadmap

Auvinen says: "Future integration with Microsoft CRM will help our employees work without limits—on the road or at the desk, online and offline, they'll have comprehensive customer and services information.

"We plan to introduce the project reporting with the integration into Microsoft Dynamics NAV. By taking reports already available in our finance system we will make the same information available for reports per customer or industry in Microsoft CRM," says Auvinen.

Finpro plans to further develop its investment in by upgrading to the latest versions of other Microsoft solutions. Furthermore, the company is planning a document management project in which it plans to roll out Microsoft Office SharePoint® Server 2007.

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about WM-data products and services, call (+358) 400 571 893 or visit the Web site at: www.wmdata.fi

For more information about Finpro products and services, call (+358) 40 343 3337 or visit the Web site at: www.finpro.fi

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.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

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Software and Services

■ Products

– Microsoft Dynamics CRM

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