

## AVANADE® CASE STUDY

# CH2M HILL Partners with Avanade to Deploy Integrated Account and Opportunity Management Platform

## CH2M HILL Builds Customer Relationship Management Solution with Microsoft Dynamics CRM 4.0 to Drive Account and Opportunity Management

In CH2M HILL's 12 autonomous business units, business development staff had adopted multiple systems to manage client relationship and sales activities. These disparate systems resulted in uncoordinated account activity across the business units and did not provide an enterprise-level view of sales opportunities. The lack of centralized data management created redundancy, unnecessary repetition, and learning/training/usability problems. Management engaged technology research firm Gartner to identify CRM solutions that would meet the company's business needs. After evaluating several solutions, CH2M HILL partnered with Avanade to implement Microsoft Dynamics® CRM 4.0 across the enterprise, improving CH2M HILL's ability to manage its business development portfolio.



### OVERVIEW

#### Industry

Engineering/Project management

#### Geography

United States/Global

#### Solution Summary

CH2M HILL partnered with Avanade to replace multiple isolated business development systems with the Microsoft Dynamics® CRM 4.0 sales module.

#### Technology

▶ Microsoft Dynamics CRM 4.0

#### Benefits

- ▶ Account and contact visibility boosts sales effectiveness and improves ability to sell services across accounts.
- ▶ Managers can make informed decisions regarding what resources to devote to which opportunities.
- ▶ Common business performance metrics across the solution drive greater selectivity for sales opportunities.
- ▶ Seamless integration with existing Microsoft® productivity and collaboration tools reduces training time, speeds user adoption, and increases efficiency.
- ▶ The CRM solution drives sales and marketing consistency and efficiencies across the firm's 12 business units.

## CUSTOMER BACKGROUND

### CH2M HILL

CH2M HILL is a global leader in full-service engineering procurement, construction, and operations headquartered in Englewood, Colorado. Broadly diversified across multiple sectors including civil infrastructure, energy, government, environmental, transportation, and water management, CH2M HILL offers a wide range of multidisciplinary services including architecture and planning, energy management, and program and construction management.

CH2M HILL program manages large, complex projects around the globe, including the London 2012 Olympics and Paralympic Games, the Panama Canal Expansion, the United States Forces Korea Base Relocation, Mumbai International Airport, and Masdar City, a zero-carbon and zero-waste sustainable city in Abu Dhabi.

Engineering News-Record ranks CH2M HILL first in a variety of sectors, including water and wastewater management, environmental services, manufacturing, and program management.

### BUSINESS CHALLENGE

CH2M HILL comprises 12 largely autonomous business units distributed around the world, which created challenges to effectively managing and using contact, account, and opportunity information. Business development professionals at the individual business units adopted various systems to manage client relationship and sales activities, including a variety of internally developed sales-opportunity tracking applications, along with offerings from Salesforce.com and SalesLogix.

By any number of measures, CH2M HILL is a leading engineering, construction, procurement, and operations firm in almost every market and industry sector it serves. But despite the success it has earned, CH2M HILL observed that the company needed to standardize on a single enterprise business development platform to help support future projected growth. The mix of disparate opportunity management systems at CH2M HILL was not providing an enterprise-level view of the business development portfolio.

Decision makers at CH2M HILL were finding it difficult to make timely, informed decisions because aggregating opportunity data across the enterprise was labor-intensive, slow, and costly. The lack of a centralized data management system created significant delays in the development of forecasts from each of the separate business units.

“Even pulling together a key pursuit list across business groups was extremely tedious,” says Tom Doerr, CH2M HILL Director of Marketing Operations. “It should have been a push-button report for the enterprise, but it often took several weeks.”

Sales opportunities and pursuits for CH2M HILL are generally long and sometimes costly processes. The company has to manage as many as 20,000 opportunities per year across the enterprise, with as many as 5,000 becoming sales pursuits. Without a centralized account or opportunity management system, CH2M HILL could not adequately coordinate selling into strategic accounts across multiple business units. “We needed centralized management because we were failing to capture so much of the interaction that happens in the course of an opportunity,” says Doerr.

While CH2M HILL professionals worked hard to overcome these business

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challenges and maintain the company's leadership position, senior management wanted to improve CH2M HILL's ability to meet future business opportunities. The company embarked on a Business Development Excellence initiative to support the company's long-term strategic initiatives and aggressive growth plans. CH2M HILL wanted to reduce or eliminate the redundancy and wasted costs in its multiple client relationship and opportunity tracking systems, as well as avoid uncoordinated selling to single accounts across business groups. Management understood that the company needed a common business development vocabulary, common performance metrics, and a single system for managing accounts, contacts, and opportunities across the enterprise.

The approach became clear; CH2M HILL needed to implement an integrated, standardized enterprise-wide tool which would:

- ▶ Provide a central knowledge management repository for business development information that is accessible firm-wide and is retained as an enterprise asset;
- ▶ Provide a consistent method of characterizing accounts, contacts, and sales opportunities;
- ▶ Provide integration support for business development processes;
- ▶ Provide a foundation for metrics on business development effectiveness;
- ▶ Provide common reporting output for client groups, business groups, and locations.

CH2M HILL leadership identified Customer Relationship Management (CRM) as the highest strategic priority to drive greater focus, selectivity, and discipline around business development. Company management began searching for an enterprise-wide CRM solution that fully integrated lead, contact, account, and opportunity management within CH2M HILL's global service-oriented business environment.

## THE SOLUTION

After evaluating several CRM solutions, CH2M HILL engaged Avanade to replace its multiple client relationship and opportunity tracking systems with Microsoft Dynamics® CRM. CH2M HILL chose Microsoft Dynamics CRM for its rich functionality, performance, scalability, ease of use, and its integration with the company's existing infrastructure, productivity, and collaboration technologies.

### Evaluating customer relationship management systems

The CH2M HILL executive management team recognized that the company's business development infrastructure needed a comprehensive customer relationship management application. The company contracted Gartner, globally recognized IT research and advisory consultants, to identify the CRM solutions that would meet CH2M HILL's business needs, using criteria focused largely on scalability, size, and system maturity.

After reviewing Gartner's recommendations, CH2M HILL thoroughly evaluated offerings from five CRM vendors: SalesLogix, Salesforce.com, Onyx, Siebel, and Microsoft, ultimately contracting Microsoft and Salesforce.com to each perform a proof-of-concept. Microsoft and Salesforce.com performed detailed use-case evaluations and executed system configurations and integrations to demonstrate how each system would address CH2M HILL's business requirements.

After a year of research and analysis, the CH2M HILL executive management team

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concluded that Microsoft Dynamics CRM not only met the company's business requirements but also provided the best-value for implementing a customer relationship management, opportunity management, and sales support system for the enterprise.

Implementing Microsoft Dynamics CRM was a logical extension of CH2M HILL's existing IT infrastructure and of its end-user environment. Integration with CH2M HILL's existing Microsoft® Office 2003, Office Outlook®, and SQL Server™ 2005 environments would support lower costs of implementation and drive immediate user adoption and improved communication and collaboration across all aspects of the enterprise. "We felt that, from an adoption perspective, it would be important to use the tools that employees were already using every day, specifically Outlook and SharePoint Server," says Doerr. "The integration with our existing IT infrastructure was also an investment we wanted to leverage."

In addition to selecting Microsoft Dynamics CRM, CH2M HILL chose Avanade as the system integrator to help implement the solution across the enterprise. "Try as we might, we could not make a number of the vendors understand that we sell services here, not widgets," says Mark Lasswell, CH2M HILL President and Group Chief Executive. "It was clear that Avanade understood the business problem we were trying to solve, and that translated to the selection committee. It was a very strong partnership between Avanade and Microsoft that won the procurement."

#### **Building customer relationship and opportunity management tools**

Initially CH2M HILL partnered with Avanade to develop a Microsoft Dynamics CRM 3.0 solution, but early in the process decided to work with Avanade and Microsoft to become an early-adopter of Microsoft Dynamics CRM 4.0, to take advantage of enhanced functionality and capabilities, including new multi-currency capabilities and ad-hoc reporting.

The business development professionals at CH2M HILL use the features of the CRM solution to manage leads, accounts, and opportunities. In addition the integration of SharePoint technologies enables collaboration on RFP responses, and provides an additional data management repository for account plans and strategies. CH2M HILL uses the solution to organize and present data with clear ownership and accountability. Marketing and sales staff use the lead-management system in the CRM solution to follow leads through the system until they become viable opportunities. CH2M HILL and Avanade also developed customized opportunity management features in the CRM solution. "We're integrating our business rules and configuring the CRM system to provide common metrics across the enterprise," says Doerr. "We are able to produce good sales forecasting reports, and we're able to track sales performance out of the system."

#### **AVANADE VALUE**

CH2M HILL had a high level of confidence in Avanade's expertise, knowledge, and experience with Microsoft Dynamics CRM—Avanade was the integrator for Microsoft's own Microsoft Dynamics CRM deployment. In addition, CH2M HILL was impressed with how effectively Avanade understood CH2M HILL's business challenges, and how Avanade was able to customize the CRM solution to meet CH2M HILL's current and future business needs.

"Avanade has been a strong, committed partner, and has been indispensable to the success of the project," says Doerr. "They brought a high level of discipline,

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goal setting, follow-through, and accountability.”

Avanade’s close relationship with Microsoft provided CH2M HILL with proven deployment experience and business insight combined with solid product innovation. According to Doerr, when issues came up during the deployment process, the connection between Avanade and the Microsoft development team became extremely valuable. To meet project timetables and goals efficiently, CH2M HILL took advantage of Avanade assets, including Data Audit, Relationship Tree, SharePoint Integration, and License Manager.

“Avanade helped us drive the schedule very hard and really drove the deployment to completion,” says Doerr. “They captured our business requirements and created detailed work plans, application designs, configurations, and customizations. We quickly realized how important our relationship with Avanade was going to be to the project’s success.”

## RESULTS

With Microsoft Dynamics CRM, CH2M HILL gained a consistent, unified 360-degree view of its existing customers and sales opportunities. Integrating with and taking advantage of existing IT infrastructure investments will help the company lower its total cost of ownership. Additionally, choosing an easy-to-use interface promotes user adoption, while improved knowledge management and collaboration will enhance employee productivity.

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### Account and contact visibility boosts effectiveness

Using its fully integrated CRM solution, CH2M HILL is able to significantly enhance account and opportunity visibility throughout the enterprise and especially across business groups. By replacing disparate opportunity-management solutions that isolated information within business groups, CH2M HILL can improve each business group’s ability to sell services across accounts and to make informed decisions regarding what resources to devote to which opportunities.

With the CRM solution, CH2M HILL can provide its business development staff a 360-degree view of clients—a record of all the opportunities, programs, contacts, and communication associated with a client in a single, centrally available application. “We’re achieving a holistic view of the client that we really haven’t had before,” says Doerr. “We had bits and pieces, but they were scattered in all these different systems throughout the enterprise. Now we can put it together into one enterprise view.”

Better account and opportunity management improves each business group’s ability to up sell and cross sell the CH2M HILL service portfolio across the enterprise. By generating common business performance metrics across the system, CH2M HILL can drive greater selectivity for sales opportunities. “Having better accounts and contacts visibility drives effectiveness in the organization,” says Doerr. “And common metrics from these systems enable us to make better decisions about which opportunities to pursue.”

### Integrated platform and standardized tools support future growth

With Microsoft Dynamics CRM 4.0, CH2M HILL can seamlessly integrate its CRM solution with its existing Microsoft Office 2003, Office Outlook, and SQL Server

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2005 technologies, providing users of the CRM solution with a familiar working environment and interface. By utilizing the investment already made in existing infrastructure, productivity tools, and collaboration tools, CH2M HILL reduces training time, accelerates user adoption, and ultimately decreases time to market due to enhanced business development productivity and efficiency.

CH2M HILL is using Microsoft Dynamics CRM 4.0 to execute an initiative to standardize tools across the enterprise. From business development to project delivery, CH2M HILL is implementing new standards, processes, and tools to efficiently scale operations to accommodate its anticipated growth. In conjunction with this initiative, CH2M HILL management can use its new Microsoft Dynamics CRM solution to drive sales and marketing consistency and efficiencies across the firm's 12 business units.

#### **Better account management drives competitiveness and growth**

With the new CRM solution, company analysts can for the first time pull data together from throughout the enterprise to capture sales, forecasting, and business development costs, so CH2M HILL can develop return-on-investment evaluations for specific accounts. Management has better insight into account business performance by examining the total investment and margin in particular accounts, thus guiding investment decisions toward the highest value project portfolio.

"It all comes down to account management, how effective we are at managing and growing our accounts," says Lasswell. "As we look toward doubling our revenue by 2015, it's all predicated on how well we can manage those accounts. With the CRM solution that Avanade helped us deliver, we're ready."

#### **About Avanade**

Avanade is a global IT consultancy dedicated to using the Microsoft environment to help enterprises achieve profitable growth. Through proven solutions that extend Microsoft technologies, Avanade helps enterprises increase revenue, reduce costs, and reinvest in innovation to gain competitive advantage. Avanade consultants deliver value according to each customer's requirements, timeline, and budget by combining insight, innovation, and the talent of our global workforce. Avanade, which is majority owned by Accenture, was founded in 2000 by Accenture and Microsoft Corp. Avanade has more than 8,000 professionals serving customers in 22 countries worldwide. Additional information can be found at [www.avanade.com](http://www.avanade.com).

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