

Using Dynamics CRM to create a complete customer profile



With CRM, a customer's data is displayed immediately, retrieved quickly, and wait-time is decreased

About Company

PGGM provides income protection for everyone in the Dutch healthcare and welfare sector. Acting as asset manager for pension funds, PGGM aims to be a committed, dependable, enduring and ethical partner for all its customers, offering income protection products and services that perfectly meet the needs of the sector. PGGM also administers group pension schemes for the healthcare and welfare sector. Their innovative investment approach has enabled them to achieve above average returns for their clients.

Business Situation

Part of the expansion of PGGM's service portfolio was a merger with a subsidiary company. This company offered a new career-break savings scheme.

In order to provide better assistance to the customers of both companies, it had been decided that the organisations should merge. However, the organisations worked with 2 separate Customer Relationship Management (CRM) systems. In order to optimise the service provided, PGGM wanted to centralise all customer data into one joint database. This would enable the new organisation to work with a single CRM system.

To prevent the service it offers to its customers from being adversely affected by the implementation of a new system, PGGM faced a major challenge: to convert the data of approximately 3 million customers to a single database in a relatively short period of time.

A distinction also had to be drawn between 2 service departments. In addition to being an income protection provider for the Dutch healthcare and welfare sectors, PGGM also administers the pension fund for this sector (PFZW). The service provided by these departments could not become entangled. Consequently the customer data also needed to be kept separate in the CRM system.

The Solution

PGGM worked primarily with Microsoft solutions, moreover the subsidiary company already had a positive experience of using this system. Furthermore, they wanted to avoid using customised packages as much as possible, allowing them to upgrade the system faster and adapt it to changes in the product portfolio, as required.

PGGM chose Microsoft Dynamics CRM and engaged the services of Avanade to implement. The client asked the Avanade team to provide a stable database foundation and help set up the application enabling the employees of the customer contact centre and the account managers at PGGM to provide an optimum service to their customers.

Avanade did this initially by creating a functional design of the system, in which all individual components of the system were set out and the specific requirements of PGGM implemented.

The functional design formed the basis on which the Avanade consultants, together with PGGM, set to work on the implementation of the project. Besides building a database, the work also involved a huge migration of data: converting approximately 15 million records of a total of more than 3 million customers to the new database.

In line with PGGM's requirements, Avanade also divided the customer data between the income service department and the pension fund service department.

Results

Microsoft Dynamics CRM® and the connected database were finally brought into production after 8 months via a big-bang scenario.

The CRM system was integrated with the current telephone system, and the existing line-of-business applications were linked to the new system.

Around 120 employees at PGGM now use the solution every day. It has made their work easier in a number of areas. For example, when a customer calls the contact centre, their data is displayed immediately and can be retrieved extremely quickly, ensuring wait-time for customers is decreased.

According to Arjen Bruinning, PGGM's Information manager, this positive reception can largely be attributed to the way in which Avanade, together with PGGM, carried out the implementation of Microsoft Dynamics and the underlying database.

Additionally, the employees found the new solution easier to use because they were familiar with the Windows interface.

For PGGM, the success of the CRM project left them with a taste for more and they have firm plans add information for cross-selling and up-selling to the database.

"Our aim is to obtain as full and comprehensive a customer profile as possible", concludes Bruinning. "The new CRM system and underlying database has enabled us to lay the foundation for this, so we can continue to improve the service we give to our customers."

"This design was of a very high standard. The consultants involved had a good understanding of our business. As a result, they had a good idea of which points were important for our organisation."

Arjen Bruinning,
Information Manager

"The performance is better than with our previous solution, in spite of the huge amount of data linked to it. The majority of people reacted enthusiastically and there were no problems in implementing the system on the shop floor. As a result, we haven't really had to promote the new solution at all within our organisation."

Arjen Bruinning,
Information Manager

"We worked very well together. For us, this constitutes a key point for the success of the project. We are extremely pleased with the speed with which Avanade provided support and the direct communication with our employees. You not only noticed that the consultants are experts in their field, but also their high level of commitment in making the project a success."

Arjen Bruinning,
Information Manager



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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