# ACER Case Study

## Long-Running CRM Project Delivers Dividends for Australian Council for Educational Research

Established in the early 1930s, the Australian Council for Educational Research (ACER) is a not-for-profit organisation dedicated to creating and promoting research-based knowledge, products and services. The organisation assists teachers and education decision makers at all levels by helping them to develop a better understanding of educational challenges, opportunities and progress. It also promotes better outcomes for all learners through the use of proven, effective educational approaches.

As an independent, not-for-profit organisation, ACER is self-funded, raising income through its contracted research and development projects, and through a range of educational and research-based products and services.

ACER has experienced significant growth in recent years and now has more than 300 staff located in Melbourne, Sydney, Perth, Brisbane, Adelaide, Dubai and New Delhi.

### The importance of the right software for the right task

When Lance Deveson joined ACER as Library and Information Manager six years ago he soon realised that the library needed to change the way it managed customer subscriptions.

"At the time we had around 200 plus external members of the library and were running the subscription service using a library management software package. The software was never meant to handle subscriptions so it required a lot of work and effort from the staff, taking on average up to half a librarian's time just to manage the system."

*"Where departments used to be siloed and nothing was shared, we are starting to bring everyone closer together. There's sharing of information across customers. It's a lot more efficient."*

## At a glance

### Business Objective

To manage customer subscriptions and share customer data across various departments to obtain operational efficiencies

### Solution

- Microsoft Dynamics CRM
- Microsoft Dynamics GP
- Microsoft SharePoint 2010

### Business Benefits

- Customer service has become faster, more proactive and more relevant due to the 360 degree view of customer activity and history
- Better information has opened the way for an increase in cross-selling, up-selling and more highly-targeted marketing campaigns
- Reduced duplication combined with automation of processes are delivering efficiencies across the organisation

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Deveson believed a more efficient solution would be to move the subscription data onto a customer relationship management (CRM) system. Such an approach would not only ease the management of library subscriptions; it could also enable the development of a single, more manageable contact database across the entire organisation.

"At the time we had a number of groups maintaining their own contact data. Education consultants had their list of schools that they were dealing with. The professional development group maintained another list of people using their courses and there was the subscription list in the library. All these lists were in separate Microsoft Excel files and many of the contacts were duplicated across each spreadsheet. There was a real need to share information around the organisation," he explains.

It was not as though Deveson was looking to introduce new technology. ACER already had Microsoft Dynamics CRM 3.0 installed on its servers. Brought in to help the press division manage contracts, manuscripts, author and media relationships, the system had never achieved its full potential. This was partly due to a failed supplier relationship and lack of staff training but also because there had been no clear executive-level champion or sponsor to help push adoption of the system.

## Another look at CRM

Deveson's desire to deploy CRM in the library breathed new life into the stalled CRM project. He explained the efficiencies and customer service benefits that would accrue to the organisation, particularly if the system was integrated with ACER's financial system, Microsoft Dynamics GP. As interest grew, management decided to seek external advice and they turned to the company that had successfully deployed Microsoft Dynamics GP for them some years earlier – Professional Advantage.

"The proposal that Professional Advantage came back with contained far more than we could afford, so the first step was to look at what we were and weren't willing to compromise on," Deveson says. The next six months were spent ascertaining and refining requirements with Professional Advantage conducting workshops, talking to the different departments and key users within ACER. "This period allowed Professional Advantage to work out a cheaper, easier and better solution. It's the important benefit of going through a thorough solution design phase," Deveson notes.

It was also during this time that Microsoft began unveiling the functionality that would be contained in its upcoming release of Microsoft Dynamics CRM 2011. It was obvious that a number of ACER's requirements, including integration with GP, could be met out-of-the-box with the new release, further reducing the cost and time required to deploy a workable solution. This clinched the timing and in early 2011, implementation began.

Six months later and at a quarter of the original budget estimate, ACER's professional resources division went live with the new CRM system. The remaining divisions – including assessment services, research and international operations – are scheduled to follow suit in 2012.

*"This time we've been successful and we've won over a lot of staff. Certainly coming in under budget didn't hurt. Bean counters like that kind of news."*

## How it works

With the integration of CRM and financial software systems, client data only needs to be entered once, into a master list within Microsoft Dynamics GP. From there Microsoft SharePoint passes the data across to the CRM system. This

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means that information relating to customer transactions can now be viewed along with contact history notes as part of the customer record. The approach improves the quantity and quality of information available to sales staff, streamlines the administrative effort required to manage customer transactions and preserves the integrity of information in the financial system.

Rather than dealing with multiple spreadsheets, ACER staff only need to refer to a single all-encompassing customer database. "Where departments used to be siloed and nothing was shared, we are starting to bring everyone closer together. There's sharing of information across customers. It's a lot more efficient."

Within the library it's been easy to quantify the benefits. It used to take a week to prepare and send annual subscription invoices. This year it all occurred at the touch of a button and took just an hour. If a customer phones with a query regarding a subscription, rather than having to search multiple systems or spreadsheets, staff can find the answer from a single location on their desktop.

Education consultants are also finding advantages in the new system. The software enables them to set up appointments and check customer data from the office or via their laptops and smartphones when on the road. Before calling on someone they can see if the customer has bought any books from ACER's bookshop, whether they are a member of the library or if they have attended any recent professional development courses. The customer record will also contain notes regarding any recent conversations with ACER staff. This continual availability of a 360 degree view of customer activity is presenting new opportunities for cross-selling and up-selling. It's also making customer service more meaningful.

## The future

Deveson believes that one of the biggest areas of potential for CRM is marketing. With the help of a third party bulk email tool, he plans to increase the number of emails that can be issued and tracked at any given time. "If a new version of a product comes out, we can more easily market it to existing users. If a particular school has been involved in a marketing campaign, we can see that information and we can see how they respond. We can coordinate campaigns across departments so that we don't have two marketing fliers going out to the one organisation within a single week," he says.

*"I have to say the relationship with Professional Advantage has been fantastic. The CRM staff we've been working with have been so professional. We've been really impressed by the way they keep coming to us, letting us know about the potential and possibilities of the software."*

"They've also been happy to help our in-house IT people to develop their skills. This has allowed us to keep costs down by taking on support for minor issues. It was very important that this year's implementation go well because we had tried to get the CRM up and running twice before. This time we've been successful and we've won over a lot of staff. Certainly coming in under budget didn't hurt. Bean counters like that kind of news," Deveson smiles.

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Visit: www.pa.com.au/microsoft
Email: microsoftinfo@pa.com.au
Call: 1800 126 499

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