 International real estate firm improves productivity and increases revenue with integrated and highly customised CRM.

“With our new system, staff can easily input, search and manage customer data, and rapidly build meaningful reports. The CRM has dramatically improved critical-process efficiency, reducing the number of screens and mouse clicks by over half.”

Fiona Glenton, National Manager, Information Management, Colliers International

With customer information stored on a variety of different systems, employees at real estate services company Colliers International struggled to compile client reports quickly, and target marketing messages at pre-defined customer groups. Staff wanted all customer data aggregated in one place, so they could produce quality reports quickly, and share critical information with sales and leasing agents, designers, valuers, engineers and project managers.

In 2012, IT staff created a single repository of all customer information in Australia using Microsoft Dynamics CRM 2011. With the help of Microsoft Gold Partner for Customer Relationship Management, MicroChannel Services, they integrated the CRM solution with Microsoft Exchange Server and data from the firm’s telephony company, enabling all staff to instantly track every customer communication. Using Microsoft SharePoint, IT staff also created a customer-oriented image library containing images for 25,000 properties.

Now, sales and leasing agents generate high-quality client reports in seconds rather than minutes, increasing productivity and raising company revenue. Employees also use CRM to track invitations and responses to client engagement events, improving marketing return on investment. And by linking customer enquiries to listings, team members can quickly market more properties to interested clients, improving customer service and raising turnover.

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| **Colliers International** | Industry:  Property | Location: Australia | Organisation size: 1,400 |
| Organisation Profile  Colliers International are a global real estate firm that provides brokerage, investment and agency services, valuations, advisory and property management. With 522 offices in 62 counties, the US$1.8 billion business employs 12,300 professional staff. | Business Situation  To compile reports, analyse customer information and target marketing initiatives, employees had to retrieve customer data from a variety of systems, including personal email accounts. As a result, customer interactions often took hours of preparation, which reduced productivity. | Solution  In 2012, Colliers International deployed Microsoft Dynamics CRM 2011 with the help of MicroChannel Services. Integration between CRM and Microsoft Exchange Server enables customer emails to be automatically logged, while the system also integrates with Microsoft SharePoint to store listings, transactions and images against each property. | Benefits  • Faster, better reporting  • Instant access to customer communications  • Improved client service and marketing |



Business Needs

“We needed to find more efficient ways to market tailored listings to profiled client lists, send the appropriate research and marketing to particular client groups, and target clients for the many corporate events we host each year.”

Fiona Glenton, National Manager, Information Management, Colliers International

Colliers International provides global real estate services through more than 522 offices in 62 countries across Asia Pacific, Europe, and the Americas. Throughout Australia and New Zealand, Colliers International has 46 offices with approximately 1,400 employees.

Customer data is the centre of many property sales, leases, management, consultancy and marketing activities. Staff at Colliers International generated vast quantities of this customer data and stored it in a variety of systems, including Microsoft Outlook email, Microsoft Excel spreadsheets, an in-house property system and a dedicated customer relationship management (CRM) system.

However, these systems were not integrated so compiling customer data tasks was laborious and time consuming. As a result, IT staff in Australia began formulating a number of key requirements to improve customer data management.

“We needed to reduce the number of mouse clicks and screens required to complete common tasks, such as listings compilations,” says Fiona Glenton, National Manager, Information Management, Colliers International. “In property, efficiency gains are a paramount objective, so the quicker we can supply our customers with new listing information, the greater the opportunity to negotiate a deal for our clients.”

Staff also need to analyse clients’ company and property-ownership structures and assess how much revenue is generated by clients with multiple properties or operating companies. The existing CRM, however, could not automatically aggregate this data.

“Without having all available information to hand in one place for each individual client, it was difficult to target our marketing activities and provide the right level of service,” adds Glenton. “We wanted to see at a glance who our top clients were, so we could provide the right level of service.”

To deliver on the firm’s Customer Engagement Strategy and improve client conversions, front-line brokers also wanted to improve their ability to target the right information and initiatives at the right clients.

“We needed to find more efficient ways to market tailored listings to profiled client lists, send the appropriate research and marketing to particular client groups, and target clients for the many corporate events we host each year.”

“In addition, we wanted a system that was easily accessible by all our staff – including designers, valuers, engineers and project managers – so we could use our collective knowledge about property markets across Australia, to help all our clients make the right property decisions.”

Solution

In late 2010, Colliers International began assessing options for a new CRM solution. As part of their research, IT staff visited the company’s head office in North America, which used Microsoft Dynamics CRM 4.0. Impressed, IT staff assessed the latest release of the software, Microsoft Dynamics CRM 2011.

“Microsoft Dynamics CRM 2011 appealed for two reasons,” says David Watts, National Manager, Business Systems and Development, Colliers International. “First, it is highly customisable and designed to easily integrate with multiple devices and applications,” says Watts. “This would help us integrate CRM with staff devices, enabling them to synchronise client contact details on their own mobile devices, for example.”

“Second, Dynamics CRM 2011 has an email tracking feature. This meant we could log every single customer email, so anyone opening a customer file in the CRM could instantly see all correspondence.”

“We scheduled the installation of the CRM Outlook Add-in while staff attended their training, so when they came back to their desks they were ready to go.”

David Watts, National Manager, Business Systems and Development, Colliers International

In July 2012, staff at Colliers International deployed Dynamics CRM 2011 with the help of MicroChannel Services, a Microsoft Gold Competency Partner for Customer Relationship Management. “We had worked with MicroChannel Services for four years,” says Glenton. “They understand our business and the Microsoft technology very well.”

Colliers International led the deployment for Dynamics CRM on Windows Server with a Microsoft SQL Server database, assisted by MicroChannel Services. MicroChannel Services also designed and developed a series of specialist customisations to help Colliers International meet their requirements.

“We used built-in functions wherever possible and then tailored them for the real estate industry,” says Michael Hopwood, Project Manager, MicroChannel Services. “We also created workflows that reflect the way Colliers International staff work, including an event management module and custom screens for the functions they most commonly performed.”

Microsoft SharePoint was also deployed as part of the overall solution to provide all employees with an image library of over 25,000 photos and floor plans.

Connecting the CRM to other systems proved quick and trouble free. “We found it very easy to integrate the CRM with Microsoft Exchange Server,” says Watts. “We also used a data migration application called Scribe to import data extracts from our telephony supplier and other data sources. This meant every customer call was automatically logged in the CRM.”

To help manage the desktop deployment, staff used Microsoft System Center 2012 Configuration Manager (SCCM), and to encourage rapid adoption the company created one-day training courses that included online videos developed by MicroChannel Services.

“SCCM made the desktop deployment very straightforward,” says Watts. “We scheduled the installation of the CRM Outlook Add-in while staff attended their training, so when they came back to their desks they were ready to go. We deployed geographically site-by-site in line with our training schedule until we had the CRM on 500 desktops.”

Benefits

The new system based on Microsoft Dynamics CRM 2011 provides sales and leasing agents, designers, valuers, engineers and project managers with an easy-to-use database that contains all customer data.

**Faster, better reporting**

With centralised data, staff take half the time to complete basic tasks.

“With our new system, staff can easily input, search and manage customer data, and quickly build meaningful reports,” says Glenton. “The CRM has dramatically improved critical-process efficiency, reducing the number of screens and mouse clicks by over half.

“Generating fortnightly client reports used to take our sales and leasing agents two hours—now it takes them two seconds. They are more efficient, which has increased company revenue.”

Faster reporting has dramatically affected the time taken to create stacking plans. Instead of reports being created ad-hoc, Dynamics CRM automatically generates each report for each property, displaying tenants within all floors of the property. These reports are scaled accordingly to the size of the unit/suite that a tenant occupies and are colour coded according to their lease expiry.

“Staff can create a colour-coded stacking plan in less than one minute, saving up to four hours per report.”

Fiona Glenton, National Manager, Information Management, Colliers International

“Staff can create a colour-coded stacking plan in less than one minute, saving up to four hours per report,” says Glenton. “Because they aren’t double-handling data any more, our staff can produce client reports on a scale we have not seen before.”

**Instant access to customer communications**

With familiar Microsoft Outlook views and commands, Microsoft Dynamics CRM 2011 provides staff with consistent navigation processes.

“Our teams have Outlook open all day; they can now see Outlook emails, contacts and appointments alongside client and property information without needing to log in to separate systems,” says Glenton.

Colliers International now have full line of sight into a client’s account, with fully integrated email, calendar and task tracking, and automated tracking of client phone calls. “Less data handling means fewer errors,” says Glenton.

**Improved client service and marketing**

With greater access to data and improved reporting capabilities, Colliers International can better understand where their revenue is coming from, and improve their client engagement. By using a central database, Colliers International is also able to link the enquiry and listing sides of its business.

“If a prospective client is interested in purchasing or leasing office space, brokers can now immediately access a list of available properties, and search for prospective clients who have a property requirement that matches a listing,” says Glenton. “This makes it easier for brokers to instigate conversations, ultimately increasing our revenue.”

Colliers International have also improved the way they manage property publications and corporate events.

“With Microsoft Dynamics CRM 2011, staff can add clients to a publication, or remove them from the mailing list, simply by clicking a button,” says Glenton. “This will help ensure we always send the right publication to the right clients.”

A custom-built event module allows Colliers International to more easily manage events because it automatically generates invitee lists and invitations, and tracks responses. The company’s marketing team can also see who attended events and where they work, helping them analyse trends and craft future events.

Colliers International are planning to roll out the CRM system to other business areas, including the Residential Project marketing division.

Microsoft product that was featured

Technical Information

Software and Services

Microsoft Dynamics CRM 2011

Microsoft SharePoint

Microsoft Exchange Server

Microsoft System Center 2012 Configuration Manager

Windows Server

Microsoft SQL Server

IT Issues

Reduce the time staff take to prepare and deliver premium customer service

Microsoft Dynamics allows your business to streamline and automate customer relationship management (CRM) through an intuitive interface that works exactly like the other Microsoft applications your staff already use.

**Increased sales**

Microsoft Dynamics CRM has been designed to help you discover the potential of your customer base, with 360-degree insight into the status of current customers as well as prospects, allowing you to maintain closer and more efficient contact at all times.

**Better customer service**

As well as a streamlined sales cycle you’ll enjoy better customer service, with automated processes that reduce customer handling times and ensure that your customer service is delivered consistently across all touch points.

**Better market insight**

With Microsoft Dynamics CRM you can manage all your sales and marketing initiatives and track results.



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