Professional Society Adopts XRM as a Platform for Growth

Formerly the Society of Photo-Optical Instrumentation Engineers, SPIE has been serving the needs of the optics and photonics community since 1955. Essentially a not-for-profit professional society, SPIE publishes technical journals, reference materials, and manuscripts, and organizes technical conferences, trade shows, and short-course educational programs for researchers and developers in scientific fields related to light.

Results
- Increased staff efficiency
- Improved business agility and flexibility
- New vectors for growth

Industry
Not-for-Profit

Country or Region
United States

Customer Size
175 employees

Number of Users
60 employees

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Scott Ritchey, Director of Information Technology, SPIE

Based in Bellingham, Washington, SPIE serves the needs of researchers in light-related sciences including optics, photonics, and imaging. The non-profit organization generates about $32 million in annual revenue from its membership fees, technical publications, and event attendance and exhibition fees. In recent years, SPIE has also started to leverage their publishing and event management infrastructure to support other technical organizations that share a common focus and mission.

SPIE's IT department had developed custom applications to support the organization's event management and scientific publishing activities. They originally sought out a commercial customer relationship management (CRM) system to manage limited sales functions for exhibition space and a digital library product. While evaluating off-the-shelf CRM packages, SPIE's IT team looked closely at Microsoft Dynamics CRM and were impressed by the potential to extend the solution beyond traditional sales automation and contact management, by using CRM as a platform for custom applications that were planned or in production.

"I was juggling organizational priorities in terms of large projects that we wanted to do," recalls Director of Information Technology, Scott Ritchey. "With XRM, I saw the possibility of leveraging a baseline architecture that handles data management, security, staff-facing UI, internal forms, and workflow engine, extending those baseline capabilities to meet all of our business needs in the areas of publications, event management, and others. That capability intrigued me."

Under Ritchey's guidance, SPIE implemented Microsoft Dynamics CRM in 2009 for sales and contact management, and undertook a pilot project to evaluate the XRM platform for one of SPIE's more unique services, contract book production.

Microsoft Dynamics

A Versatile, Flexible Solution

Based on the success of the pilot, Ritchey committed to the XRM platform as the eventual framework for all of SPIE's custom business applications. SPIE launched the first major release of their platform in 2012, deploying applications to support core publishing activities (including author submissions, peer reviews, and contract book publishing) and event management capabilities (including registrations, scheduling of attendees and speakers, and sales of exhibition space), as well as management of information related to thousands of courses, books, and journals.

The ability to precisely tailor forms, interfaces, and workflows around their many distinct activities has served SPIE well. "We manage tens thousands of items every year," says Ritchey. "We have a relatively small group of people managing the publication of almost 20,000 papers every year and a similarly small group managing the actual conference. There's a ton of custom interaction with outside entities like authors, reviewers, and conference chairs, so we require a very well-tuned interface and well-defined workflows."

A Future-Proof Platform

Ritchey notes that the ease with which SPIE would be able to update and maintain their custom applications through future upgrades also influenced the decision to deploy Microsoft Dynamics CRM. "The pilot project worked fantastic. But even better, when we upgraded to Microsoft Dynamics CRM 2011 *after* the pilot, it gave us the opportunity to evaluate how we might transition/upgrade a major customization.

"It was absolutely spectacular: the effort was very straightforward, it was easy to identify the changes we needed to make to remain compatible, and we could make the changes quickly. This gave us the confidence to move forward with the development work necessary to meet some of our very specific needs."

Single Platform for Multiple Needs

Today, Microsoft Dynamics CRM provides the platform that underlies virtually all of SPIE's processes and services. Ten people use the system for traditional sales automation and contact management functionality, while a larger group of 40 to 50 people use the custom applications built to support SPIE's event management and publication management businesses.

On the publishing side, functionality includes web-based author submission tools, online review tools, and workflows that route documents through the rigorous editorial processes. For the event business, applications include scheduling, access to presenter and author credentials, and mobile tools to help attendees build personalized daily schedules and otherwise manage their event experience.

"We've built out some great tools and systems, and Microsoft Dynamics CRM is the heart of that capability," says Ritchey. "We've layered a set of

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tools and capabilities on top of the framework, but it's all XRM on the back end."

Rapid Adoption

While it can be a challenge to replace a completely custom application with commercial software such as Microsoft Dynamics CRM, Ritchey notes that adoption has been relatively painless. "Coming from a purpose-built system where we had been able to tailor the interfaces to our exact workflows and business processes and achieve a very high level of automation, expectations were very high among our business users," he recalls. "But people have been positive about Microsoft Dynamics CRM."

Training time has been minimal, due largely to people's comfort with the user interface, which follows the familiar Microsoft Outlook paradigm. Ritchey notes that enthusiasm built as people became more engaged with the program. "There was a period of discovery while people figured out how to do all the things they did before, but then they also discovered the layer of tools available through the Microsoft Dynamics CRM platform. There were some great surprises, like Excel integration, bulk entity updates, and the ease of creating custom workflows."

As people learn more about the capabilities of the platform, Ritchey's team has found themselves fielding requests for additional applications, workflows, and extended solutions. "As people get into the solution, they recognize the potential to extend it, to create even better efficiencies in their everyday work. That's part of the excitement."

Rapid Development and Deployment of New Applications

Because the XRM platform dramatically reduces development time, Ritchey's team can iterate more quickly on custom solutions and enhancements to meet the demand of their business teams. SPIE's developers have deployed a range of applications, including extremely tailored systems to support SPIE's high-volume activities, as well as forms and workflows that required only slight modification out of the box, to support low-volume and one-off processes.

"Microsoft Dynamics CRM is perfect, because we can take advantage of all the core architecture without doing any substantial development," he says. "We can focus on what's specific to SPIE rather than all the underlying capabilities. The development processes were far more efficient than they would have been with a custom application. I can say that with certainty."

Benefits

Since deploying Microsoft Dynamics CRM, SPIE has streamlined its primary business processes, and enjoys far greater ability to add and change its processes in response to changes in the industry. "We have a lot more flexibility with Microsoft Dynamics CRM and XRM than we did on our custom platform," says Ritchey. "This is a much better place to be."

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Technology, SPIE

Microsoft

Increased Staff Efficiency

Since SPIE implemented Microsoft Dynamics CRM, the organization's publishing practice has continued to grow. The number of publications and the number of papers processed annually has increased to nearly 20,000 papers, without requiring an increase in staff.

"Microsoft Dynamics CRM enables a team of only eight people to manage all of the author communications and publication workflow automation to produce between 16,000 and 20,000 research papers every year," says Ritchey. "That's a very small team of people that's interacting with a huge audience with a very specific quality outcome in mind. They're doing it basically entirely on the system that we built on XRM. It's pretty awesome."

Business Agility and Flexibility

Perhaps more important than the increasing size of the workload is the changing *nature* of SPIE's workload: as the number of publications has increased, so has the demand for flexibility in production and delivery of those publications.

Whereas in the past, technical papers produced by SPIE were largely consistent in format and delivery, today there is marked variation in the requirements among various technical communities. For example, one group might produce and publish only technical abstracts, another prefer 4-page papers accompanied by rich multimedia content, and another require traditional printed 12-page research papers.

"Our XRM solution allows us to respond very quickly to these changes in the business," says Ritchey. "It's much easier to introduce a new or different version of a product or publication that we're producing. In the past, we would have to create a new entity at the database layer, hook it in to the website, develop the new interfaces and APIs, and then build forms on top of that... Today, we just define a new attribute, and almost all of the actual systems work is handled by XRM. That creates huge efficiency for unlocking our time-to-change."

Support New Vectors for Growth

The ability to quickly scale and adapt its workflows and business processes also creates opportunities for SPIE to leverage its infrastructure, by providing conference organization and publishing capabilities to organizations with similar missions. "SPIE is a nonprofit, but we're funded entirely through our activities," says Ritchey. "The flexibility and the capabilities of our systems present the opportunity to provide these services to other organizations, extending these offerings even further. It could become a major source of revenue for us."

Next Steps

- Connect with Microsoft Dynamics
- Become a Dynamic Business
- Learn about partner solutions available in the Microsoft Dynamics Marketplace

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