



Microsoft Dynamics Customer Solution Case Study

Centre Wellington centralizes data, improves citizen service with Microsoft CRM

Overview

Country or Region: Canada

Industry: Government

Customer Profile

Centre Wellington is the largest municipality in Wellington County and ranks among one of the fastest growing communities in the province of Ontario.

Business Situation

Centre Wellington wanted to enhance information access, deliver deeper business insight and meet its goals to serve its citizens more efficiently and effectively.

Solution

To improve its citizen service delivery, Centre Wellington worked with Microsoft® Certified Gold Partner Infusion to implement Microsoft Dynamics™ CRM.

Benefits

- Improved service delivery
- “A single version of the truth” across systems
- Foundation for future growth

“Developing a new technology platform based on Microsoft CRM is helping Centre Wellington to meet its mandate to serve its citizens more efficiently and effectively.”

David Boyle, IT manager at Centre Wellington

Centre Wellington is the largest municipality in Wellington County and ranks among one of the fastest growing communities in the province of Ontario. To improve its citizen service delivery, Centre Wellington worked with Microsoft® Certified Gold Partner Infusion Development to implement Microsoft Dynamics™ CRM. The customer relationship management (CRM) solution helps to develop a foundation for user information that more easily integrates with existing business systems. The Windows-based solution allows the municipality to enhance information access, deliver deeper business insight and meet its goals to serve its citizens more efficiently and effectively.



Situation

Whether it's applying for a building permit or filling out a birth certificate application, today's citizens demand a high level of online service delivery from their city government. The residents of the Township of Centre Wellington are no exception.

Located in Ontario, Centre Wellington represents a vibrant mix of industrial, commercial and residential sectors. Formed through the amalgamation of Fergus, Elora, and parts of Nichol, Pilkington, West Garafraxa and Eramosa Townships, Centre Wellington today represents one of the fastest-growing communities in Ontario with more than 26,000 residents.

Centre Wellington wanted to streamline access to services and information – helping the municipality be more responsive to online citizen queries, track service requests faster and better manage the city's knowledge base. In order to support its evolving public service needs, the municipality developed a five-year strategic plan that focused on revamping its IT application environment.

The goal, says David Boyle, IT Manager, Centre Wellington, was to transform its customer relationship management (CRM) processes to help service residents more efficiently and effectively. To support this strategy, the municipality needed to first improve the level of communication integration among departments, automate processes and track service requests. Centre Wellington also uses numerous applications to track citizen records and information, which resulted in silos of information and disparate data sources. As a result, municipal staff spent time sifting through data in order to achieve a 360-degree view of citizens.

Any time a citizen engages with Centre Wellington – be it for filing for a death certificate or a dog tag license – the

transaction needs to connect with the back-end financial system to ensure the proper account numbers and records are assigned. This, however, was largely done manually as many of the business applications couldn't integrate and update each other in real time.

By integrating siloed information, Centre Wellington could improve service delivery and reduce operational costs. With streamlined processes, workers would be able to provide enhanced customer service through quick, convenient access to records and information.

“One of the challenges and opportunities that exist within all municipalities in Ontario and across Canada is that there's no global software system specifically created to run municipalities,” says Boyle. “What happens is that many municipalities, cities and regions across Canada have what we call islands of information, making it difficult to access data quickly and effectively.”

Solution

After evaluating various technology and customer relationship management systems, Centre Wellington worked with Microsoft® Certified Gold Partner Infusion Development to implement Microsoft Dynamics™ CRM business management software.

Centre Wellington decided to deploy Microsoft CRM in part because it would easily integrate with the existing Microsoft-based technologies used by the municipality, especially the Microsoft Office Outlook® messaging and collaboration client, which employees use to send and read e-mail.

To ensure a swift implementation, says Bill Baldasti, Vice President of Canadian Sales, Infusion Development, Centre Wellington first engaged in a proof of concept in early 2009

in order to deploy the Microsoft CRM platform across its IT architecture.

“The municipality was seeking an intuitive and flexible CRM platform that could be deployed rapidly and cost-effectively across multiple departments. This not only streamlined operations, it also provided staff with the reporting tools they need to help improve service delivery,” says Baldasti.

The IT staff at Centre Wellington first developed a central database repository for information and customer records. Leveraging Microsoft CRM, the municipality was able to create a centralized contact centre to facilitate citizen contacts from a number of sources.

“What we liked about Microsoft CRM is that it helps us to build all of our line of business applications in one development platform,” says Boyle. “This helps us to minimize the number of integration points that we need in our systems so that it can be sustained and managed. It’s something that we can use as a platform to build for the future.

Several back office systems are now integrated into Microsoft CRM, giving staff a more complete view of citizens’ contact history. This helps them access real-time information and deliver the right information to citizens – helping to reduce inefficiencies on behalf of both citizens and staff.

Benefits

Centre Wellington is using Microsoft CRM to develop standardized processes to collect, track, and integrate service requests across all its departments. As a result, the municipality has created a broader view of the demand for services – thus helping improve service delivery for its constituents.

Improved service delivery

Centre Wellington is using the new technology platform based on Microsoft CRM to provide better service delivery without incurring large costs. Centre Wellington is using Microsoft CRM to boost responsiveness and improving the quality of service. Previously, staff would put in a request to the IT department for a report and typically have to wait up for two weeks. Today, staff can now generate reports within a matter of minutes.

“Using Microsoft CRM, we’ve been able to transform our internal workflow as staff can use the new reporting tools to access and analyze information quickly and easily. This not only helps to boost our responsiveness to citizen queries, it helps us automate processes and improve the quality of service we can deliver,” says Boyle.

“A single version of the truth”

The municipality is also using Microsoft CRM to transform the way it responds to citizens by providing a single point of access to all services. Staff at Centre Wellington can now access information in real-time, which helps ensure that there is less duplication of data and more accurate and updated information. The new platform is based on Microsoft CRM and will allow Centre Wellington to consolidate its line of business applications into a single development framework.

“Developing a new technology platform based on Microsoft CRM is helping Centre Wellington to meet its mandate to serve its citizens more efficiently and effectively. The Microsoft-based system enables the municipality to enhance service delivery and deliver a more holistic and ‘single version of the truth’ for each resident contact,” says Baldasti.

For More Information

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For more information about Centre Wellington products and services, visit the Web site at: www.centrewellington.ca

Foundation for future growth

Upon completing of the proof of concept, Centre Wellington expects a full deployment by early 2010. This initiative serves as an initial foundation to move into a position where Centre Wellington can deliver e-services to constituents and residents. By leveraging the initial CRM investment and using existing resources to develop other applications, IT staff can also boost the speed of developing and managing new tools while reducing development costs.

"Improving our technology processes help our staff to drive better communication and improve the ability for the community to access services online. And we're trying to do two things here, we're trying to improve service to the community and also move to a lower transaction cost of service, so that we can keep operating costs down," says Boyle.

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Software & Services

- Microsoft Dynamics™ CRM