



Life planning firm expands business by 150% with integrated CRM system



Client overview

Manchester-based The Co-operative Life Planning specializes in life planning products, including prepaid funeral plans. It works with a range of channel partners.



Solution

To match its ambitions, The Co-operative Life Planning chose Microsoft Dynamics CRM 4.0 customer relationship software with Microsoft Dynamics GP 10.0 for its new infrastructure.



Results

By implementing Microsoft Dynamics, The Co-operative Life Planning:

- Expanded business by 150 per cent
- Consolidated its business management systems
- Automated processes that were previously manual

“ With the new infrastructure, business has expanded by 150 per cent and we can bring products to market much more quickly. We have seen significant time savings in managing our internal processes.

- Tim Martin, Senior Operations Manager,
The Co-operative Life Planning

Company overview

The Co-operative Life Planning, part of the Co-operative Group in the UK, specializes in prepaid funeral plans for its customers. Established as a separate legal entity, Manchester-based Co-operative Life Planning took advantage of an opportunity in 2007 to change its infrastructure.



A CRM system to foster better collaboration

The Co-operative Life Planning needed a customer relationship management (CRM) and business management system to launch products and collaborate more easily with channel partners.

Tim Martin, Senior Operations Manager, The Co-operative Life Planning, says: “Life Planning was originally part of another business, so its critical systems were shared across many different business functions. They were not customized for our needs or to accommodate the potential for expansion of our specialized business by creating products and adding new channel partners. The previous applications were inflexible and expensive to customize.”

In addition, there was a drive within The Co-operative Funeralcare, which has 800 branches in the UK, to rationalize its accounting systems and move away from Oracle Telesales integrated with Oracle Financials. Martin says: “We decided we needed to look at alternative options.”

The Co-operative Life Planning considered acquiring a customized, externally developed application as well as Oracle E-Business Suite and looked at four vendors. The central considerations for the business were time-to-market, a more useable interface, more powerful data searching, and ease of integration with the Microsoft Office suite of applications. Martin says: “Above all, we needed a system that was easy to configure when adding new products or channel partners. By doing so, it would result in less reliance on development resources, and, by extension, lower costs.”

To match these ambitions, the business chose Microsoft Dynamics CRM 4.0 customer relationship software with Microsoft Dynamics GP 10.0 for its new infrastructure. As a result, the volume of transactions has expanded by 150 percent, boosting productivity without the need to hire additional staff.

Customization, flexibility, and ease-of-use



Microsoft Gold Certified Partner sa.global recommended a solution using Microsoft Dynamics CRM 4.0 integrated with Microsoft Dynamics GP 10.0 business management software. These applications cover the life planning business including management of the end-to-end sales process, dealing with enquiries as well as sales, marketing, and finance reporting. The solution uses Microsoft SQL Server data management software mirrored to the business' disaster recovery site.

The true strength of Microsoft Dynamics CRM is in its ability to combine sales, customer satisfaction, and service features with automated CRM. It allows full integration with Microsoft Office tools for e-mail messaging, word processing, and spreadsheets. Microsoft Dynamics GP supports the CRM software with financial applications along with distribution capabilities. It also provides many user options for customizing the system to individual needs. Both products offer flexibility and ease-of-use to employees, and inter-operate easily with other core business systems.

With the solution, users can manage business-critical print activity using workflow, process incoming data files, and produce files for third-party processing. The automated processes include the capacity to void transactions, establish direct debit collections, and create journals. The technology provides advanced business intelligence features as well as automatic reclamation of receivables. There are 49 users of Microsoft Dynamics CRM and around 18 of Microsoft Dynamics GP.

The infrastructure accepts new plans from customers, customizes workflow for each product, and handles business partner reporting. Critically, the integration of Microsoft Dynamics GP and Microsoft Dynamics CRM helps ensure that customers contacting the call centre can get instant feedback on the status of their plans. Previously, this was a manual process involving agents having to call back the customer up to two days later, which resulted in wasted time and reduced customer satisfaction.

Carl Ray, Professional Services Director, sa.global, said: "We finished the work on time and within budget, with extremely tight deadlines and a nine-month window to go-live. Previously, there were more than 12 databases containing different product information and four separate environments. Since we started work, we have added several new channel partners. The customer has already saved £100,000 since moving from Oracle and has experienced an eight per cent uplift in response rates compared to the previous system."

Simon Wiseman, Project Manager, The Co-operative Life Planning, commenting on the business relationship with sa.global, stated: "It's about as good as it gets. sa.global was extremely thorough with what was a highly complex implementation that has transformed our capacity to expand our business and accept new channel partners."



Consolidated systems and an environment for growth

The Co-operative Life Planning has consolidated its business management systems and automated many processes that were previously manual, thereby creating an environment for new growth. Martin said: “With the new infrastructure, business has expanded by 150 per cent and we can bring products to market much more quickly. We have seen significant time savings in managing our internal processes and hugely increased productivity — without having to employ additional people.”

- Easier configuration: The new infrastructure has many more configurable elements than the previous business applications, leading to a reduced reliance on developers, and lower costs
- Customizable to meet different business needs: It became simpler to create print queues, which resulted in savings compared to the cost of development using the previous business applications
- More powerful data searching features: The system has powerful data searching capacity,

which has increased the number of users from one to eight. Previously, not all staff could carry out searches because knowledge of SQL Server was required

- User-friendly interface: The user interface is much easier to navigate than before and has the advantage of being familiar to all staff due to the use of other Microsoft applications throughout the business
- Faster mail merge: Mail merge and manipulation of data sets was speeded up because the infrastructure easily integrated with products such as Microsoft Office Word and Office Excel spreadsheet software. Previously, it was not always possible to export data to Excel or to choose different fonts
- Better disaster recovery: The infrastructure has a built-in disaster recovery solution that helps ensure continuity of business in the event of a system failure, and restoration within two hours, thereby reducing the possibility of extensive downtime

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