



Business School Improves Top-Line Growth With xRM-Based Custom Applications

Overview

Country or Region: Australia

Industry: Education—Higher education

Customer Profile

Melbourne, Australia-based Melbourne Business School is one of the largest business schools in the Asia Pacific region. Its staff of 200 serves approximately 700 students each year.

Business Situation

The school wanted to create a single view of all interactions with and information related to its applicants, students, participants, alumni, and donors for better data accuracy and management.

Solution

Melbourne Business School worked with Oakton, a Microsoft® Gold Certified Partner, to accelerate the development of relational line-of-business applications built on the xRM development platform.

Benefits

- One platform for many applications
- Improved constituent relationships
- Increased revenue, reduced operating costs
- Fast, cost-effective development
- Widespread user adoption

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Melbourne Business School needed to improve information management regarding its prospective and current students, alumni, donors, guest lecturers, and other constituents with whom the school interacts. Working with Oakton, a Microsoft® Gold Certified Partner, the school turned to Microsoft Dynamics® CRM and its underlying development platform, xRM, to accelerate the creation of integrated solutions that track communications and automate workflow processes. Consolidating data sources and automating processes frees school staff to cultivate closer relationships with constituents, which ultimately contributes to increased revenue, overall business agility, and the school’s reputation for progressive, global leadership.

What is xRM?

xRM is a Microsoft application platform layer that underpins Microsoft Dynamics CRM. It accelerates the development of relational line-of-business applications through point-and-click configurations or customizations. The platform is built upon integration-friendly Microsoft technologies, such as Windows Server®, Microsoft SQL Server, and the Microsoft .NET Framework.

Situation

Melbourne Business School uses leading-edge practices to teach its students about business management theory and practice. The school employs a staff of 200, teaches approximately 700 students annually, and has more than 14,000 alumni from 70 countries.

The school faced difficulty tracking interactions with its many constituent groups—prospective and current students, alumni, donors, guest lecturers, employers, and others involved with the school.

For any one of its constituents, Melbourne Business School stored data in multiple places. It also maintained nine separate, non-interactive Web-based applications for collecting information. In total, Melbourne Business School had 27 separate data sources, nearly all of which were tightly controlled by different functional areas of the school. “We had no way of knowing which bits of constituent information around the school were most accurate and up-to-date,” says Ric Lamont, former Chief Information Officer at Melbourne Business School. “It really hampered our ability to effectively communicate with constituents.”

Melbourne Business School recognized the urgent need to create a single view of all constituent interactions and to store and manage that data in one system. It also was important to communicate with each constituent in an appropriate manner according to the constituent’s current role. “We wanted to stop adding to the load that staff carried and develop integrated solutions that would support us in building and maintaining closer relationships with our constituents,” says Lamont.

Solution

Melbourne Business School mapped out a strategy and set out to find the right vendor partners to support it. “We had a large number of CRM [customer relationship management] applications to choose from, but each seemed to focus on one particular area,” says Lamont. “While one may have been the best for fundraising efforts, it didn’t fully support all the other areas we needed, such as providing a portal for student involvement with our career center.”

After considering its options, the school chose Microsoft Dynamics® CRM and its underlying xRM development platform to use as a rapid development platform. “We saw that no one vendor had a life-cycle solution targeted specifically for the CRM needs of higher education institutions,” says Lamont. “But we realized that we could address our needs by creating our own solutions and that Microsoft offered the best application-development environment for what we wanted to accomplish. In part, this was because of its tight integration with the Microsoft® Office programs that we use on a daily basis.”

Melbourne Business School also found a willing partner in Oakton, a Microsoft Gold Certified Partner and leading provider of business-focused IT solutions. Oakton had a great deal of expertise in using the xRM platform, upon which Microsoft Dynamics CRM is built, to accelerate the development of custom, relational line-of-business applications.

“We’ve learned that we can use Microsoft Dynamics CRM to solve customers’ problems both effectively and efficiently because we can take advantage of a lot of useful out-of-the-

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Ron Coldebella, Service Line Manager,
Oakton

box features,” says Ron Coldebella, Service Line Manager for Oakton. This results in customized, relational line-of-business applications that address needs specific to Melbourne Business School. Examples include:

- **Constituent management system.** The school’s strategy called for the creation of numerous integrated portal solutions—all drawing from a single data source—to handle every aspect of constituent management. The team decided to build the solutions on xRM and Microsoft Office SharePoint® Server 2007 and connect them with the Microsoft Office Outlook® 2007 messaging and collaboration client, Microsoft Exchange Server 2007, and Microsoft Internet Security and Acceleration Server 2006.

The school eliminated its many databases and set up a single database, which runs on Microsoft SQL Server® 2005 data management software, as the underlying data source. In that way, staff all can access the same set of information and can keep constituent information up-to-date and accurate.

Development began in earnest in January 2008, when the team established a detailed understanding of the school’s existing practices and what it wanted to change. Despite the complexity, the development portion of the project took just three months of a 10-month total project timeline.

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- **Applicant management.** One of the school’s highest-priority challenges was to provide complete online school registration. Oakton developed an xRM-based solution that walks applicants through a series of forms that it presents through a Web-based Office SharePoint Server 2007 portal. The forms ask prospective students to provide detailed work histories, career aspirations, current and desired salaries, and other pertinent information.

The school previously asked applicants to send that kind of information in hard-copy format and it would then distribute photocopies of each applicant’s information to reviewers. But the new online solution automatically enforces a series of business rules, ensuring that an applicant provides all necessary information at each stage before moving to the next.

Prospective students now choose their desired program—including part-time, full-time, and weekend programs—and are automatically presented with a different checklist to work through for each program. All the information submission occurs online. “Rather than spending time gathering information, staff can direct their time and energy toward meeting applicants, either in person or through conference calls,” says Lamont. “Essentially, with the new online application, our staff has been able to go from being box tickers to being relationship generators.”

- **Admissions evaluation.** Another application that Oakton built on xRM supports the evaluation process for student applications. After an applicant’s information has been

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captured by the online portal, it automatically triggers an electronic workflow process that frees up weeks of staff attention.

In the past, admissions staff printed numerous documents and loaded physical folders to send to the appropriate reviewers through interdepartmental mail. That staff member also had to gather the reviewers' feedback and applicant ranking data and then compile a comprehensive report on each prospective student for evaluation. On average, the process took three weeks. “By the time we were able to get back to some prospective students, they'd already accepted an offer to a different business school,” recalls Lamont.

Now, when the school receives a complete online application, admissions staff can tag the appropriate reviewers and the built-in automated workflow process sends the applicant's information to an Office SharePoint Server 2007 site. Reviewers now see all relevant application details, make notes, provide a ranking, and electronically submit their feedback for each applicant.

A workflow engine collects all reviewer feedback for a particular applicant, compiles the report for the associate dean, and sends it to him or her automatically. A decision by this person then generates an automatic e-mail message to be sent to the prospective student. With the new system, the school now provides responses to prospective students in just one week.

- **Careers case management.** The careers case management application is another custom solution built on xRM. Career case management is important to graduating students and to the school. “A key factor in the evaluation of all globally ranked business schools is how well students are placed following graduation,” says Lamont. “The top-prospective students take those rankings very seriously.”

Prior to the custom application, career-management consultants handled students and potential employers alike in an ad-hoc, paper-based manner. Melbourne Business School and Oakton turned to xRM and other Microsoft technologies to create a solution with careers in mind.

“We set up an Office SharePoint Server 2007 portal for students and alumni. It has advanced Web functionality, including blogs, discussion boards, and other interactive features,” says Lamont. “We also use the portal to push out announcements and job advertisements. We pull those from a separate portal that we provide for potential employers, who log on and submit their job openings.”

An average of 45 employers search the student and alumni portal for suitable job candidates. Five internal staff members routinely use it, checking for new job prospects, the types of job roles that students are seeking, and the career events that they attend. And nearly all of the school's 200 full-time students and some part-time students take advantage of it.

The school has solutions in place for its other constituents, too. For instance, it has xRM-based solutions

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that support alumni and donor communication, creating not only awareness of school events but also tracking interactions with these two vital constituencies.

Benefits

For the school, using the xRM platform has meant shorter development timelines and lower project costs. Melbourne Business School also has increased staff productivity thanks to the ease of use and intuitive design that come with xRM.

Creating and implementing xRM-based applications also makes it possible for Melbourne Business School to cultivate stronger relationships with its constituents. “It’s essential that we operate as global business leaders in every facet of the school,” says Lamont.

- **Improved constituent relationships.**

The school now can easily adjust the content and tone of its communications with a given constituent over time. “With just one place for all constituent data and confidence in its accuracy, we can be much more effective in our interactions with potential, current, and graduated students. Enhanced relationships translate into top-line growth, which is critical for us,” says Lamont.

Melbourne Business School considers its new ability to monitor and manage constituent interactions an advantage over other business schools. “Our xRM solutions serve as a worldwide competitive differentiator for us,” says Lamont. “They make our constituent interactions more meaningful at every stage, which is important for

marketing and fundraising campaigns as well as program enrichment and job placement.”

- **Increased revenue and reduced operating costs.** Having streamlined and automated many of its processes, the school has increased staff efficiency and minimized its operating costs. “We no longer have to maintain our nine information-gathering applications, which alone decreases our hardware, licensing, and administration costs,” says Lamont. “Also, our internal resources spend far less time dealing with photocopying, shuffling folders, and follow-up activities. They now dedicate more of each day to actively creating value, such as interacting with prospective students, speakers, and donors.”

In addition, the diminished turnaround time for evaluating applications and closer relationships with prospective students have combined to create a positive effect on admissions. “Our xRM solutions have massively reduced the amount of paperwork involved with student admissions. More importantly, they’ve had a major impact on our conversion ratio and, therefore, our revenue,” says Lamont. “By making offers this year within one week of applications being submitted, not three, we were able to enroll five additional, highly qualified, sought-after students. There’s been a direct correlation between the solutions and last year’s [U.S.]\$300,000 increase in revenue.”

For Melbourne Business School, using xRM to build custom applications has saved time and conserved resources. “Working within a traditional development environment would have

taken the joint team longer to produce solutions because we wouldn't have already had the core capabilities to build on, such as marketing, activity management, cases, and others," says Lamont.

Adds Coldebella, "With Microsoft Dynamics CRM, we don't have to spend any time addressing a solution's 'plumbing' issues, such as security and integration. Instead, we can take that extra time and devote it to the things that really matter, like user experience, user interfaces, and navigation."

Oakton helped keep project costs down by assigning a team that only needed one senior developer with highly specialized skills. "As opposed to other methods, it's remarkably easy to develop solutions," says Coldebella. "Not having to devote higher-priced resources to a project represents cost savings that we're able to pass along."

As a result, the school received cost-effective solutions that it was able to put in place more quickly than custom applications. "Producing solutions using a traditional development approach would have taken more time and thus cost more to deliver," says Coldebella. "Plus, the school can address its particular needs without attempting to tie together a lot of separate point solutions."

- **Widespread user adoption.** The new solutions built on xRM have been readily adopted by staff, which means that the school is deriving better value from its technology investment. "Our users' familiarity with Microsoft technologies makes them more comfortable with the school's overall cultural shift to information sharing

and with the solutions we give them to support that shift," says Lamont. "Just judging by the amount of data that we're already storing in them, our new solutions are being heavily used and regarded as valuable tools."

- **Business agility.** Because xRM can be used to create a range of diverse solutions, it provides the flexibility to meet the needs of a variety of industries, including those of higher education. "Microsoft Dynamics CRM doesn't come with a lot of business processes that lock users into one way of doing things. We see that flexibility as a real positive—the best of both worlds," says Coldebella.

Not only can Melbourne Business School and Oakton use the same technologies to create new solutions as necessary, it also can easily alter its existing xRM-based applications. "As we continually review our solutions and processes, we're quite happy with the way that Microsoft Dynamics CRM can be adapted to meet our changing needs," says Lamont.

Overall, xRM gives Melbourne Business School fast, flexible access to highly effective solutions that will support the institution into the future.

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For more information about Oakton products and services, call (61) 3 9617 0200 or visit the Web site at:
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