

## *Taking communication to a new level*



### THE FACTS:

- > New Zealand's leading cooperative network of independently owned and operated telecommunications partners.
- > More than 40 stores owned nationwide.
- > Provider of mobile, broadband & fixed-line telecommunications solutions.
- > Servicing retail customers, small, medium and large corporations.
- > [www.orb.co.nz](http://www.orb.co.nz)

### THE SOLUTION:

- > A tailored Microsoft Dynamics CRM configuration, delivered via Appserv's Software as a Service (SaaS).
- > 24 x 7 x 365 technical support from trained CRM specialists.

### THE RESULT:

- > A fast, flexible information platform allowing Orb to deliver timely, personalised service to its customers.



Orb Communications knew that upgrading their Customer Relationship Management (CRM) system would require much more than an off-the-shelf solution. They chose Markinson for their proven customisation experience across a wide range of industries.

## MARKINSON & ORB COMMUNICATIONS

To better serve your customers, you need a system for managing your relationships. With a unique business structure and customers ranging from individuals to leading corporations, Orb Communications knew that upgrading their Customer Relationship Management (CRM) system would require much more than an off-the-shelf solution.

After a careful assessment process, they turned to Markinson to create a CRM specifically for their needs. The result has been a revolution in the way the company deals with its customers: the creation of a fast and flexible information platform which is allowing Orb to deliver the high quality, personalised service that its customers have come to demand.



### The situation

Orb Communications is New Zealand's leading network of independently owned and operated telecommunications retailers, with more than 40 stores independently owned by 24 shareholders nationwide.

A dealer for the Telecom network, Orb delivers expert mobile, broadband and fixed-line services to a diverse range of clients, including retail customers, SMEs and some of New Zealand's largest corporations.

To keep track of its customers, Orb was using multiple systems that weren't ideally suited to the task. "We didn't have enough control over the software to get the functionality we needed," says Matt Evans, Orb Communication's General Manger of Sales and Marketing.

"Putting together a 360 degree view of a customer, for example, meant consulting both in-house and from within Telecom, up to four separate systems – a process that was inhibiting our customer service as well as our ability to cross sell."

To deliver the levels of service that customers were expecting, Orb needed a comprehensive CRM system that could provide an instant, at-a-glance picture of a customer and their services.

"We knew we needed a better CRM solution," says Evans. "But we also knew that with our unique co-operative structure – 40 stores owned and run by 24 different shareholders – any new solution would need to be highly customised."

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## The solution

Armed with a detailed list of requirements, Orb began to investigate potential vendors, eventually selecting Markinson.

“Whomever we partnered with needed to be able to understand our business practices and create a CRM solution to fit,” says Evans. “We chose Markinson for their CRM specific experience and proven customisation expertise across a wide range of industries.”

To create a CRM platform that would provide Orb with a flexible system for the storing and viewing of customer data that was fully integrated with its day-to-day operations, Markinson recommended Microsoft Dynamics CRM.

Microsoft Dynamics met each of Orb’s requirements. It was highly customisable, could be adapted to meet Orb’s need for user security and data separation between independent retailers, and could also be run and managed from a centralised, hosted environment. Being a cooperative, the main focus of the project was that Orb needed to protect the data owned by each shareholder, ensuring Orb Head Office still had a global view.

“A centralised solution had many advantages,” says Evans, “including automated management, easy access from our stores through a web browser, and low installation and rollout costs.”

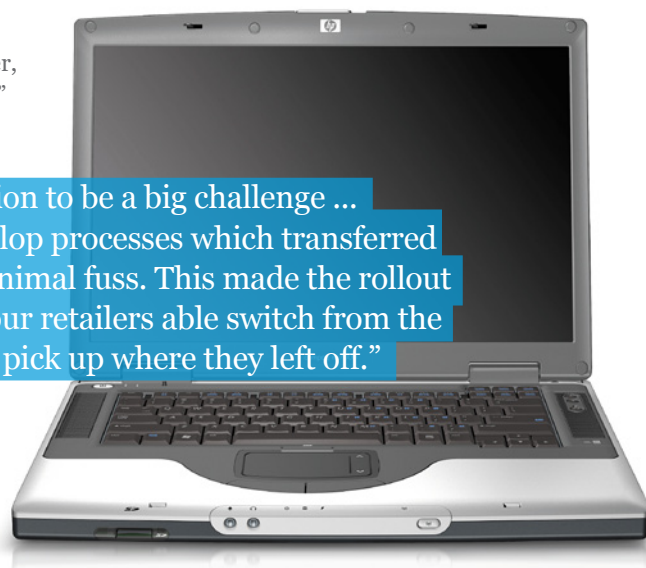
Working closely with Orb, Markinson developed Orb’s new CRM system, tailoring it to the company’s requirements. To ensure application performance, the solution utilised Appserv’s Software as a Service (SaaS) solution for Microsoft Dynamics CRM. This eliminated any need for additional planning or lead times associated with the implementation of infrastructure. It also delivered against the specific capabilities required by Orb Communications.

Upon the completion of the development and testing phases, a five store pilot of the resulting application was conducted.

“The pilot was important in that it allowed us to watch the solution in action,” says Evans. “By the end, we were certain that Markinson had delivered the right CRM for our operations.”

Asked about implementation, Evans says that a critical part of the project was the migration of existing customer and product information from a wide range of individual databases and from several Telecom systems, as well as developing the accurate updates of this data going forward.

“We expected the data migration to be a big challenge ... Markinson were able to develop processes which transferred the data quickly and with minimal fuss. This made the rollout process a smooth one, with our retailers able switch from the old to the new system and to pick up where they left off.”



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## The Benefits

Now live and running nationally across Orb's operations, Evans says that the CRM solution provided by Markinson has been a unqualified success, providing the company with instantly accessible information and insight into its customers while ramping up its ability to serve them.

"From contact details, to product histories, customer activity and current contracts, the existence of a one stop shop for customer information has been a boon for our business," says Evans. "Individuals, small and medium businesses and larger corporations have come to expect that when you engage with them, you're dealing with current information. The Markinson CRM has brought that ability to Orb Communications."

Asked about further benefits, Evans points to the fact that the CRM's database can now be mined to create business opportunities. "Not only are our stores taking advantage of new workflows to improve our customer service and data accuracy, we're also obtaining additional business through streamlined lead management and opportunities functionality," he observes. "Microsoft CRM is also working as an effective sales management tool, enabling us to closely track and measure the performance of our sales teams – something that's invaluable from a management perspective".

The future is rosy for the Orb and Markinson partnership with plans for further investment in the solution on the horizon. "We're looking to expand the service elements of the Microsoft Dynamics CRM software to enable us to track service based staff such as installers, return and repair and IT services, and that's where we're focusing our efforts next," says Evans.

About his experience with Markinson, Evans says that the company has been fantastic.

**"Throughout the project Markinson have delivered on what they've promised," he declares. "Their approach has been professional, dedicated and honest. From the initial consulting process through to customisation and project management, we've mattered to them. They've been extremely receptive to our feedback, reactive to our requests and we've benefitted immensely from their advice and experience."**

He adds, "They've really invested time in getting to understand our end-to-end business requirements and delivered a solution that is tailored to our needs."

Markinson continues to monitor the performance of Orb's CRM, working with Appserv to manage the solution. "The SaaS delivery has provided our business with the flexibility to access and use the infrastructure as and when required. From the initial development and testing through to pilot and full rollout, we had access to whatever we needed" said Evans. Ongoing development requirements include a separate testing environment provided by Appserv. This further extends the capability of the Markinson solution.

"I'd absolutely recommend Markinson's services to any organisation on the search for a new or superior CRM. They have exceeded our expectations," he says.



**For more information on how a Markinson CRM solution can benefit your business, visit:**

[markinson.co.nz](http://markinson.co.nz)  
or call 0800 725 375

