

Project management firm improves consistency, accuracy and automation with Microsoft Dynamics®-based tool

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Andrew Newling, Senior Consultant, Tracy Brunstrom Hammond

Independent project managers Tracy Brunstrom & Hammond (TBH) sought greater efficiency in the way they managed documentation and correspondence across hundreds of projects. They wanted to standardise the way documents were produced and processed to improve compliance, while also creating the ability for directors to conduct comprehensive project reviews without having to go on-site.

Microsoft partner Enabling introduced TBH to a project management application called IPM. Built on Microsoft’s flexible business software, Microsoft Dynamics® CRM, this out-of-the-box product adapts Microsoft Dynamics CRM’s standard functionality to specific project-related elements and processes, creating a comprehensive project management tool.

Documentation is standardised with the help of specially designed templates, while integration with Microsoft Exchange Server means emails can be tagged to projects and correspondence easily tracked. Standard workflow procedures are automated, with alerts sent to staff whenever specific issues or documents require action.

As a result, project delivery is already more efficient. Clients know what to look out for when they receive a document and contractual wording is reliable, making for better service and compliance. Project risk is also reduced, partly because directors can review every element of a project’s progress from their head offices. Slippages are now easier to uncover and client expectations easier to manage.



Tracy Brunstrom Hammond

Industry: Professional Services

Location: Australia

Organisation size: Approximately 200

Organisation Profile

Established in 1965 Tracey Brunstrom & Hammond (TBH) is one of Australia’s most experienced providers of independent project management services, having completed more than 7,000 projects and 1,000 expert reports. Headquartered in Sydney, the company has offices in Brisbane, Perth, Adelaide, Melbourne and Singapore.

Business Situation

With so many projects on the boil, TBH sought greater efficiency in the way they tracked correspondence. They also wanted consistency in the way they delivered and managed documentation. As they grew, they could clearly see that manual data management was stunting productivity and making it harder to meet their compliance obligations.

Solution

Microsoft Dynamics CRM will enable TBH to manage and track correspondence and documentation better than ever, and even remotely, with a centralised database of every project’s status across the organisation.

Benefits

- Consistent approach to project delivery
- Time-saving efficiencies
- Reduced commercial risk
- Increased profitability
- Nationwide accessibility to data
- Remote staff access
- Flexibility

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Andrew Newling, Senior Consultant, TBH

Business Needs

Delivering a project efficiently – on time and within budget – is no easy task, especially when it involves large-scale construction or engineering. Successful outcomes require careful initial planning, and complex relationships between owners, end users, designers, authorities, suppliers and contractors require continuous management.

Central to high calibre project management is the way the project management system handles documentation and correspondence. Independent project management specialist Tracy Brunstrom & Hammond (TBH) was looking at how they could improve these processes. Top of its agenda was a method for automating the management, tracking and archiving of the thousands of emails they receive every day, and establishing an audit trail of correspondence relating to each specific project.

TBH also wanted to ensure they delivered consistent, high quality documentation right across the company to improve compliance and reduce risk. Staff traditionally used Microsoft® Excel spreadsheets to track and budget projects. These spreadsheets were stored locally, which made it hard to establish quality control and consistency right across the company, and difficult to review projects without visiting the local office. TBH wanted to create a central repository for documents created on templates to ensure consistency, best practice and compliance with state and national legislation.

Solution

Andrew Newling, Senior Consultant at TBH investigated a range of technical options, including two applications that had been built specifically for project management in the construction industry.

Andrew also approached Microsoft partner Enabling who introduced him to a customised Microsoft Dynamics CRM application. Developed by project management software specialist, IPM Global, this application is based on Microsoft Dynamics CRM’s xRM application development framework, which accelerates the development and delivery of relationship-oriented business applications – in this case project management, documentation, communications and processes.

Called ‘Its Project Management’ (IPM), the customisation was available in an out-of-the-box configuration, although the Microsoft Dynamics CRM core meant it could readily integrate with TBH’s existing Microsoft Office applications. Andrew asked Enabling to demonstrate IPM and was immediately impressed.

“It soon became clear the IPM product with Microsoft Dynamics CRM could tick all the boxes, and would enable us to achieve our business goals,” says Andrew. “Microsoft is a trusted brand, and the fact that Microsoft Dynamics CRM works with Microsoft Office Outlook was a big bonus because it would make the system far easier to use.”

The demonstration quickly progressed to an engagement, with IPM Global helping Enabling to adapt the solution for trial.

“We provided samples of our document templates and discussed ideal workflows together,” says Andrew. “A few weeks later Enabling came back with a plan for the implementation phase that suited TBH’s business requirements.”

The product assigns a unique ID code to each project, and when correspondence is created it is automatically filed against the respective project, creating an easily accessible email chain. This means staff at TBH can swiftly track

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Andrew Newling, Senior Consultant, TBH

variations to projects, critical notifications and site instructions.

In addition, project management workflows are automated, helping TBH honour its commitment to timely responses.

“Some documents have to be reviewed by directors before proceeding to the next stage, so we have automated this process, with reminders and alerts to ensure that we are always compliant,” says Andrew.

Benefits

After trialling the Microsoft Dynamics CRM-based solution, Andrew Newling saw in an instant how it would transform the way TBH did business.

“The capabilities are impressive; I have no doubt that this will make us more efficient,” he says.

Consistent approach to project delivery

With everyone in the organisation using the same templates, the company will be able to guarantee that contractual wording is accurate and precise, and that TBH provides a consistent, high-quality approach to project delivery.

Moreover, as documents are always presented in this consistent format, clients can recognise them and know what to look for or fill out, an added benefit that makes client interaction easier.

Time-saving efficiencies

Staff will save time as they no longer have to locate or recreate project management forms or templates. As soon as project information is entered or altered, the project management tool uploads the update onto other relevant templates.

“We anticipate saving a significant number of man hours over time and this alone should give us a rapid return on investment,” says Andrew. “We’ll also reduce human

errors and time wasted on multiple data entry across Microsoft Word and Excel documents.”

Reduced commercial risk

The IPM application gives TBH an email audit trail so they can track all correspondence by job. This aids transparency and helps staff to quickly navigate decision-making history and retrieve critical information, such as project finance, agreed dates and contracts.

Moreover, now that they have one centralised project management solution, managers can quickly see and report on job slippage so they can adjust expectations and processes to match the anticipated timeframe. This will make management reporting far simpler.

The new solution also puts important checks and balances in place to ensure quality control is maintained at all times. For example, some tasks automatically place a ‘hold’ on a form or document until a director has reviewed it.

Andrew sees these features as some of the key benefits of the Microsoft Dynamics CRM-based project management tool.

“IPM’s ability to automatically file emails against projects ensures our staff use accurate, compliant information,” he says. “It is our belief that the inbuilt checks and balances will significantly reduce commercial risk over time.”

Improve productivity

Another objective for TBH was to improve staff productivity. For instance, previous documentation processes were detailed and laborious, meaning that TBH managers could not delegate much of their work. However, the new system has automated and standardised many of the templates and workflows.

“The new system enables staff to work more collaboratively,

Technical Information

Software and Services

IPM Project powered by Microsoft Dynamics® CRM

IT Issues

Project control and management

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enabling

supporting our company's business model, which provides a senior person to oversee the work of every junior team," says Andrew.

On-demand project review

With offices located across Australia and in Singapore storing their own information, senior managers had previously found it difficult to get hold of documentation when trying to conduct project reviews remotely.

"Now with a single database stored on one central server, authorised staff members can view a project's status whenever they wish, simply by logging in," adds Andrew.

Improved remote access

IPM can be deployed out of the box through Microsoft Office Outlook and with Web browser access. TBH plans to use this capability to provide staff with more flexibility in how they work.

"By providing staff with online access from a Web browser, they will be able to work on projects, update information and remain completely informed when out in the field or at home," says Andrew.

Improved growth capabilities

The new solution also gives TBH the flexibility they need to work in today's changing business environment.

"If we open a new office, grow or scale, we simply add more users to the system," comments Andrew.

"It's also easy to add new capabilities or new templates.

For example, if new legislation is introduced we can make sure it is consistently incorporated nationally or at state level. The system is fully customisable, which allows us to continue evolving our solution to match our changing needs."

Microsoft Dynamics CRM

Microsoft Dynamics CRM allows you to manage projects more efficiently with the ability to track, monitor, and retrieve highly detailed information about each project, activity, and task. With a comprehensive 360-degree view of your customers and streamlined processes, it's easier to complete projects on time and within budget.

IPM

IPM Global is a project management software company that specialises in developing business software for project-related industries, in particular construction engineering. The company uses the Microsoft Dynamics CRM's xRM application development framework and delivers products to the marketplace via the Microsoft Partner Network. Its IPM product is a fully integrated project management tool that integrates seamlessly with other Microsoft applications and back office ERP solutions.

For More Information

For more information about Microsoft Dynamics, call the sales and information line on 1800 197 960 Monday to Friday 9am to 5.30pm AEST. To find a partner or solution, visit <http://dynamics.pinpoint.microsoft.com/>

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