



A CRM solution that reduces costs and increases efficiency

Key Benefits:

- Significantly reduced IT costs
- Smooth data migration
- Maintained service levels
- CRM available to new users

"Gap Consulting is a very professional organisation with great people who know the product and are good at drawing out and understanding the complexity of your requirements."

Carbon Trust engages Gap Consulting to build and design a new CRM solution that provides multiple benefits

Carbon Trust is a world-leading organisation helping businesses, governments and the public sector to accelerate the move to a low carbon economy through carbon reduction, energy-saving strategies and commercialising low carbon technologies.

Carbon Trust helps its clients by advising them on how to reduce carbon emissions; enabling them to gain recognition for their work in carbon reduction through labelling schemes and working with them to develop new low-carbon technologies.

Significantly reducing IT costs

Carbon Trust was facing a funding cut from the Government for its work with businesses. Needing to significantly reduce its IT costs, the organisation began to look at alternatives to its existing customer relationship management tool.

The CRM solution also needed to be flexible enough to allow different areas of the company to run complex permissions, in order to ensure that the commercial parts of the business did not have access to data from the public-sector funded parts of the business.

The organisation wanted to give more areas of the business access to CRM in order to enable them to become more efficient and productive, but the main business driver for the project for an alternative CRM solution was to reduce costs.

"We looked at the project carefully before proceeding, because we knew it would take some development work to move us from Salesforce.com to Microsoft CRM," explains Tim Lancaster, Transition Director. "We had money at the time that we were able to spend changing things, that we wouldn't have going forwards. We were prepared to swallow development costs if we could get to lower running costs."



"Gap Consulting works flexibly with you as your needs change and not only configures the system but can also provide web services for interfacing with other systems. In particular, they are great at working to deadlines and budgets and getting the job done."

TIM LANCASTER, TRANSITION DIRECTOR AT CARBON TRUST

A logical CRM solution

Following a procurement exercise Carbon Trust engaged Gap Consulting to carry out a proof of concept for its new CRM solution. Lancaster says, "We liked what they did at proof of concept and we then did separate selection processes for the design and for the build and they won both of those."

The organisation already used Microsoft technology and was looking to move to cloud-based versions of Exchange and Outlook, so it made sense to move to its Microsoft Dynamics CRM solution. "It seemed to us that there was a benefit in people being able to access the CRM data within Outlook because that's where they held their other customer data," explains Lancaster. "It made us more inclined to go with Microsoft Dynamics than with something else that cost the same but was not as well integrated."

Gap Consulting worked closely with the project team from Carbon Trust to define the requirements for the CRM solution to ensure it suited the business and had the right level of customisation for each subsidiary. Another key

phase of the project was the data migration, and Gap Consulting's expertise was particularly useful in this area. Lancaster says, "We had to take in a lot of data from the Salesforce system, spread sheets and other sources so an effective data migration was vital. Gap Consulting was able to provide us with scripting tools and experience in using them that enabled us to get the data into the new CRM system quickly and easily."

Widely used across the business

The new Microsoft Dynamics CRM solution is used by up to 80 employees, for contact management, sales process support and event management including areas of the business that were not previously integrated with the previous CRM systems.

One new area of the business using the system is a new subsidiary that helps companies select and finance energy efficient equipment – they are using the new CRM to manage all their dealings with customers. At the other end of the scale, the system is being used by Carbon Trust's main

consultancy business which works with large global brand retail customers to manage their engagements.

The new CRM solution also supports Carbon Trust's security policy, by enabling data to be blocked off from different subsidiaries across the organisation. "There are certain rules for what can and cannot be shared," explains Lancaster. "Gap Consulting has built the solution to allow us to control the flow of data to fit those restrictions."

Solution benefits

The move to a Microsoft Dynamics CRM solution has provided Carbon Trust with a wide range of benefits across the business.

"The most obvious benefit is that it enables us to continue to provide a service, but to do so at a lower cost," says Lancaster. "Funding cuts meant we needed to reduce our IT costs from £5m to £1m and we've achieved that. Our running costs are now lower. They are about a sixth of what they were previously."

This financial streamlining has been achieved whilst maintaining a good user experience and a high level of customer service. Lancaster says, "The people who are using it generally seem to like it and appreciate the integration with Outlook. There certainly hasn't been a dip in service."

Carbon Trust has been able to extend the new CRM to other areas of the business that had previously had access to the system for managing their sales processes and customer contacts. "We've been able to add our innovations business and our policy and markets areas," explains Lancaster. "Both of these subsidiaries were not on the previous system but were keen to take advantage of the benefits of our new CRM."

"Gap Consulting was flexible and adaptable as a partner. We weren't initially expecting to work with one company throughout, but they were easy to work with. Gap Consulting was able to respond quickly to our changing needs and deal in a reasonable way where we had to delay for one reason or another. They were a good partner to work with," concludes Lancaster.