

Better together...

**Microsoft SharePoint Server
& Dynamics CRM**

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Hands up....

1. Who works at an organisation that uses Dynamics CRM?
2. Who works at an organisation that uses Microsoft Sharepoint?
3. Who works at an organisation that uses BOTH .Dynamics CRM and Microsoft SharePoint?
4. Who works at an organisation that uses NEITHER Dynamics CRM and Microsoft SharePoint?

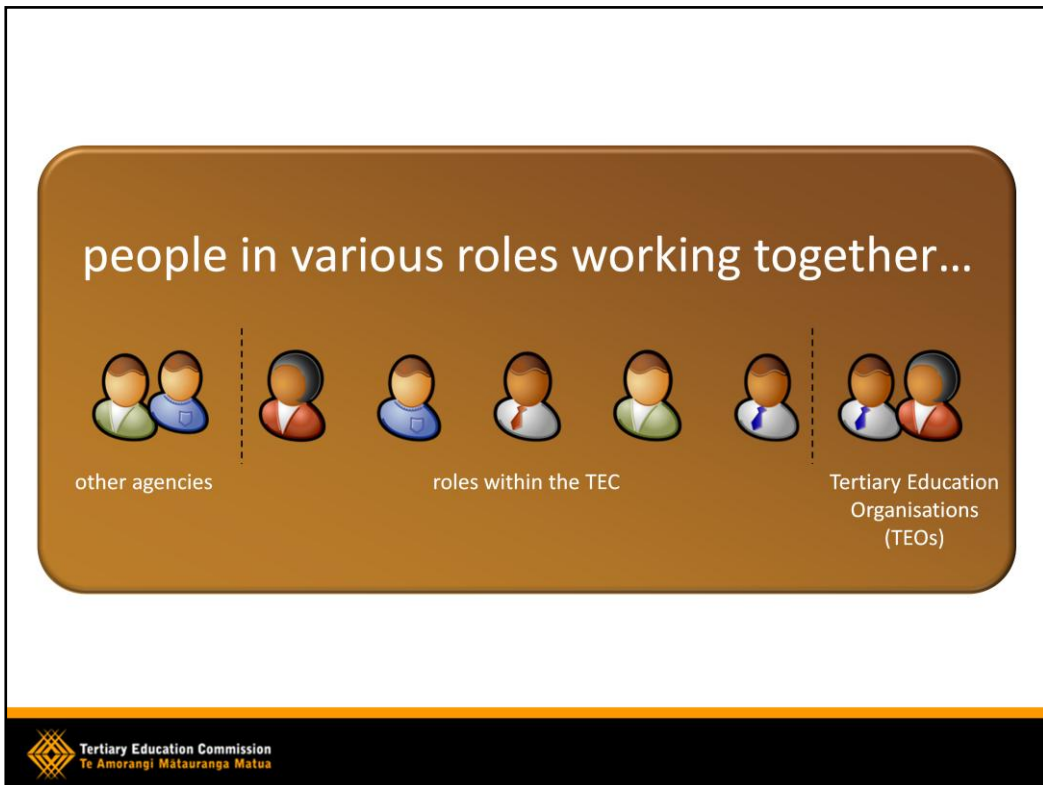


.About the Tertiary Education Commission (TEC)

- Responsible for leading the government's relationship with the tertiary education sector, and for policy development and implementation
- 270 staff, primarily located at National Office in Wellington, with the balance located at our Service Centre in Wiri, South Auckland
- Distributes \$3billion of funding to approximately 900 Tertiary Education Organisations (TEOs)

About CRM and MOSS at the TEC

- In the beginning it was like the romance
- The nascent potential of products that would work together seamlessly and a move away from bespoke system builds
- And so the vision was born...



Why this vision?

2006 – Tertiary Reforms and changes to the Education Act

Emphasis on building relationships with Tertiary Education Organisations (TEOs)

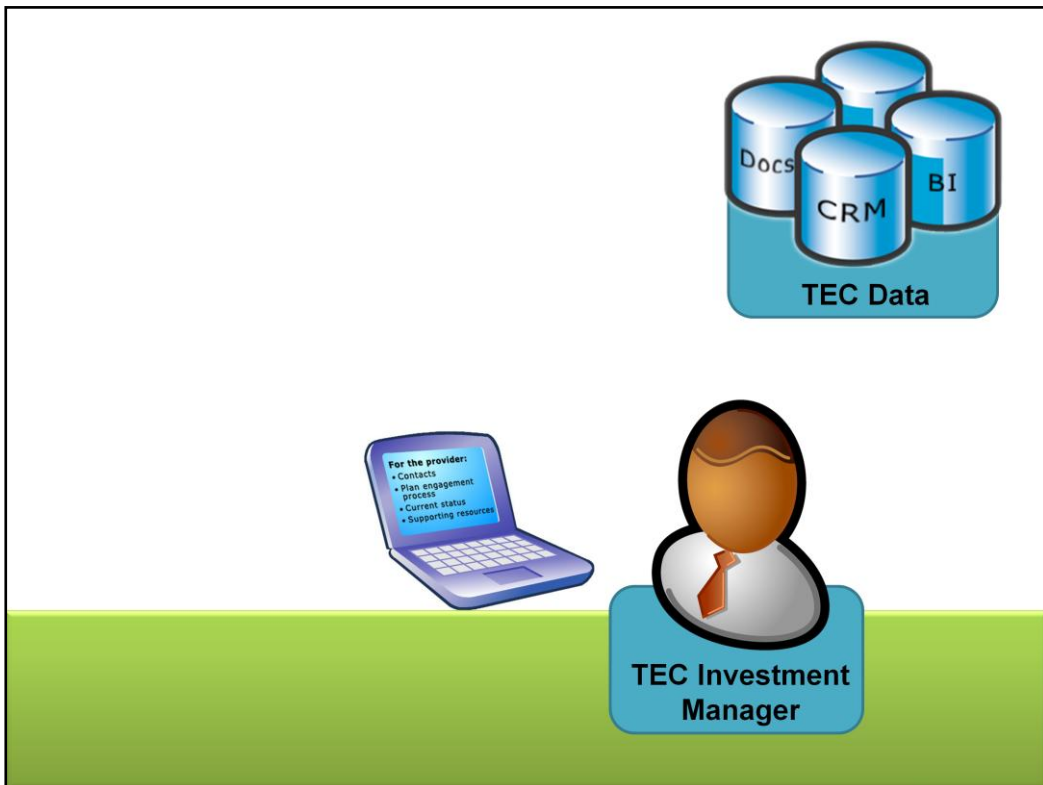
Collaboration between the TEC and TEOs specifically highlighted

Investing in the provision of tertiary education rather than just purchasing “bums on seats” delivery that typified the 1990s when our tax dollar was going towards the likes of “twilight golf”

Move to creating a TEO-centric organisation rather than a funds-centric organisation.

Immediate high level requirements included

- relationship management
- changes to the way we managed contracts
- a need to organise information in a way that supported a TEO-centric perspective.



How did we think that vision of Tertiary Education funding might be realised with the support of technology, specifically Dynamics CRM and Microsoft Sharepoint?

By taking an intra-organisational role-based approach.

For example...

Click 1 = data stores – historically a mix of Sybase, Oracle, Access, Postgres, SAS and SQL – move all to SQL

Click 2 = Investment Manager

Click 3 = laptop enlarge

Click 4 = info arrows

Click 5 = Investment Manager shrink and slide

Click 6 = slide transition to TEO;
whole sequence

Click 7 = TEO shrink and slide;
transition to Team Manager slide;

same information as a basis but summarised and aggregated according to need, e.g....

Click 8 = transition to “vision” photo



Back at the end of 2006 / early 2007, that was the vision

Taking an intra-organisational role-based approach, and cherry picking across the technology platform (Dyanmics CRM and Microsoft SharePoint) to deliver services that were TEO-centric, not funds-centric.



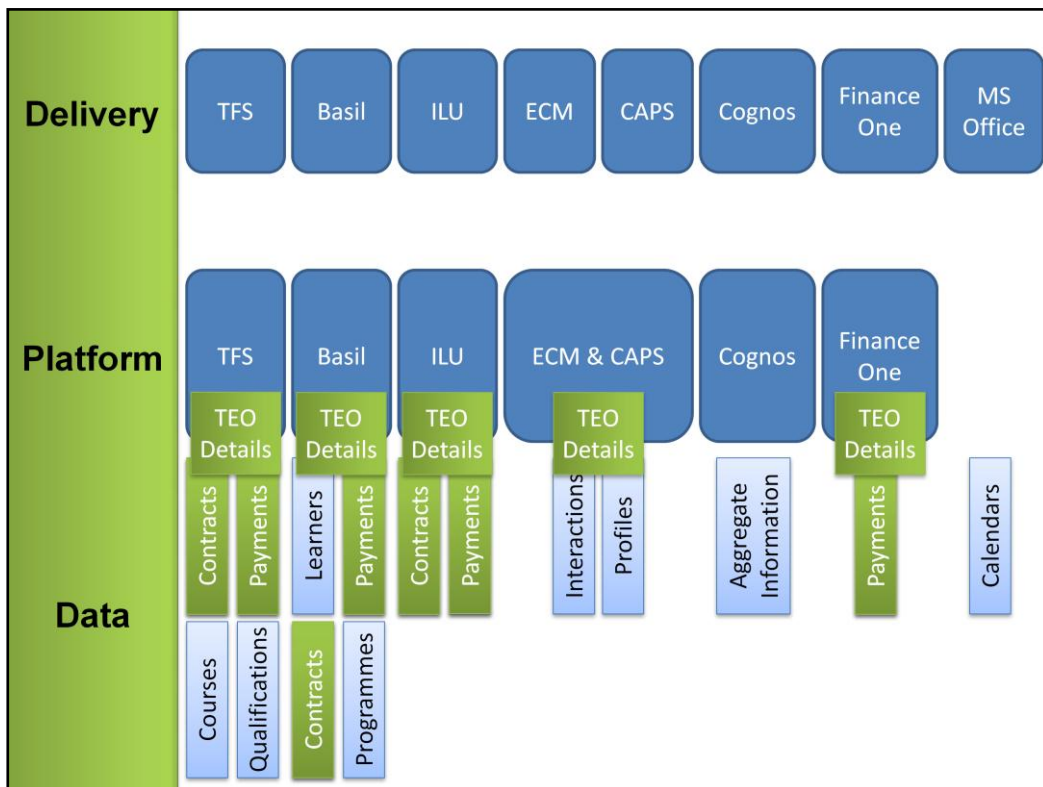
This was a revolutionary approach because of the TEC's fragmented past...

TEC was born on 1 January 2003.

Amalgamation of Skill New Zealand and the former Tertiary Resourcing Division of the Ministry of Education. Each organisation brought staff, cultures, systems and processes for managing funds to be disbursed on behalf of the government.

TEC inherited these systems and began using them together, even though systems and processes were at odds with each other.

As well as these inherited systems and processes, new systems and processes were also designed and implemented using incongruent technologies.



Each system was a vertical application

This meant silos of information, e.g. contractual and payment information for a TEO was fragmented across multiple systems

Click 1 & 2 = Contracts

Click 3 & 4 = Payments

Serious duplication of critical information, such as TEO contact information, which appeared in every line-of-business system

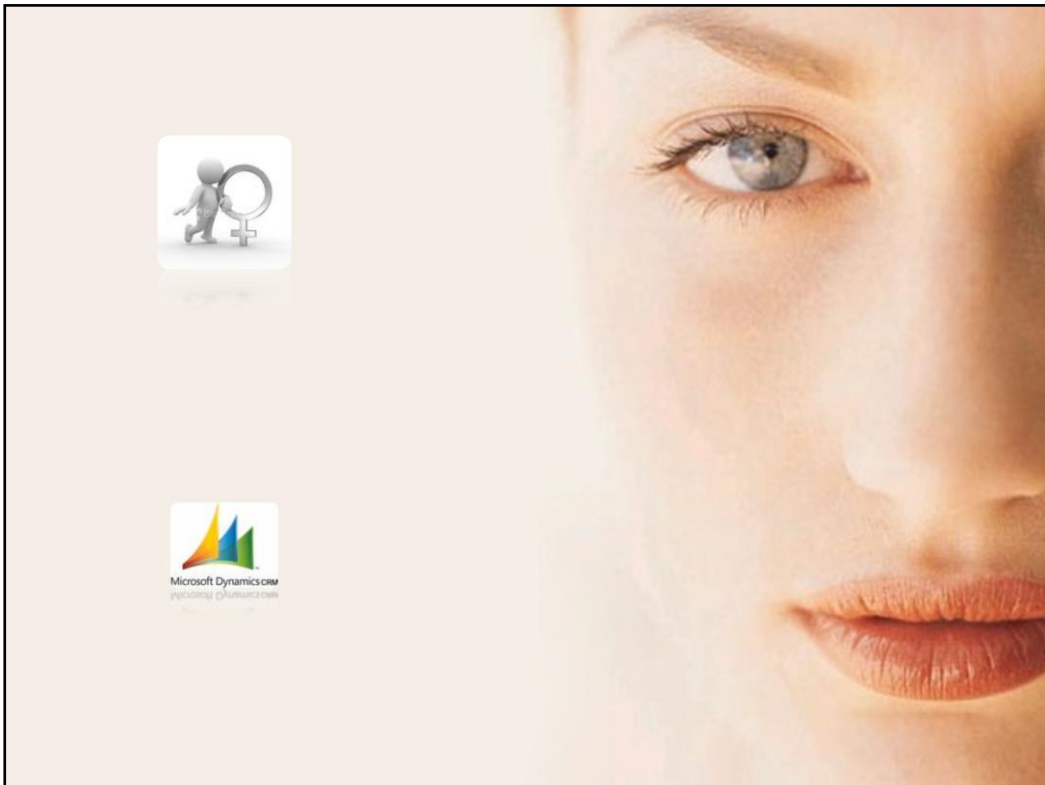
Click 5 & 6 = TEO Details

Other issues included:

- Poor integration across applications
- Many web-based applications which had difficulty integrating with the Desktop environment
- Inconsistent usability
- Focus on function at the expense of form = less than optimal user experience
- All were bespoke
- Most were funds-focused and were end-to-end funds management systems, i.e. not TEO-centric (the customer). Made it very difficult to understand the complete picture from any single TEO's perspective.

Click 7 = transition to next animation

The vision reflected a desire to become customer focussed rather than the historical funds focus – i.e. TEO-centric systems and processes, not funds centric systems and processes.

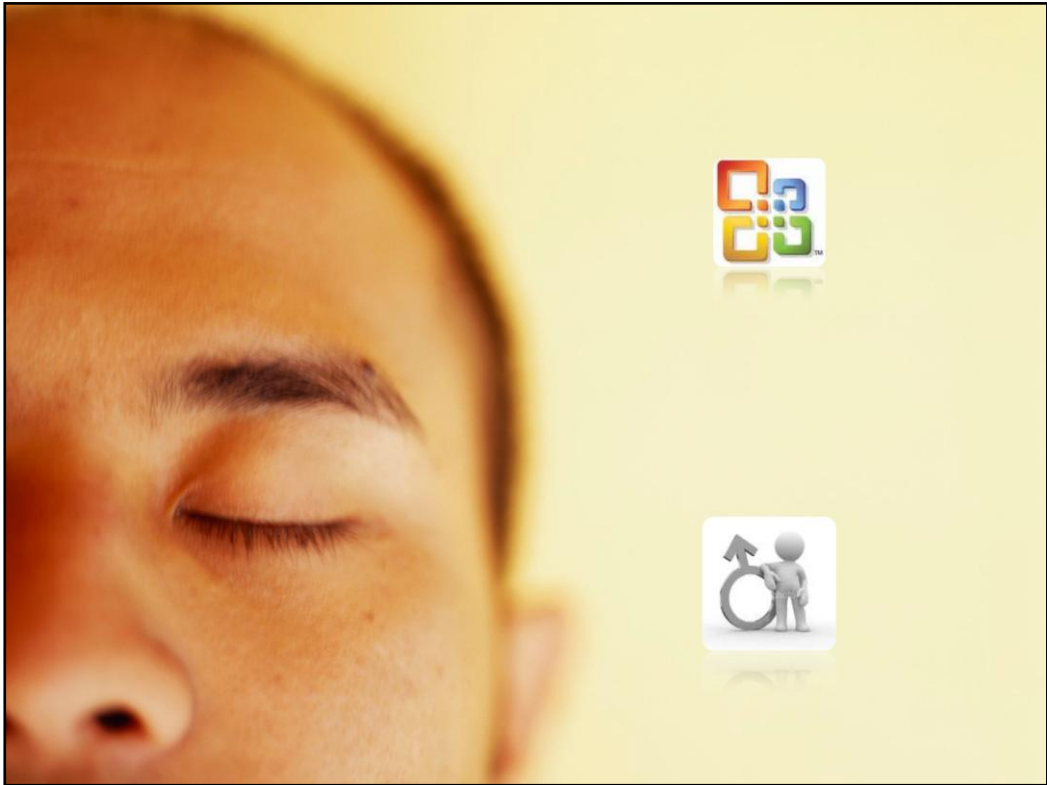


For the purposes of today, Dynamics CRM symbolises the feminine aspects of a relationship:

- central point for all information relating to our customers (TEOs)
- all things relational

e.g. knows all the important events and dates, like most women remember birthdays and anniversaries

Click = transition



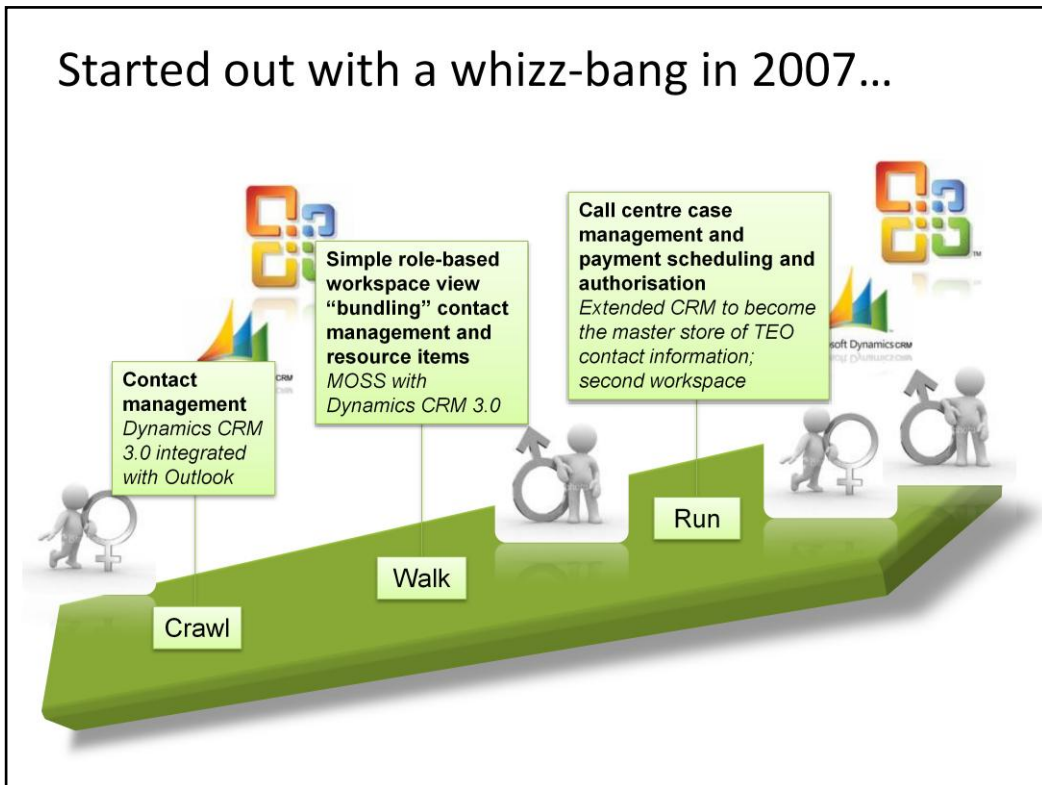
And Microsoft SharePoint symbolises the masculine aspects of a relationship:

- putting all the documents and other items in order and in place
- making sure the right content matches the location

e.g. A bit like a bloke's alphabetised music collection

Click = transition

Started out with a whizz-bang in 2007...



The vision of early 2007 began to be implemented using the tried and true “crawl before you walk before you run” approach

Click 1 = crawl

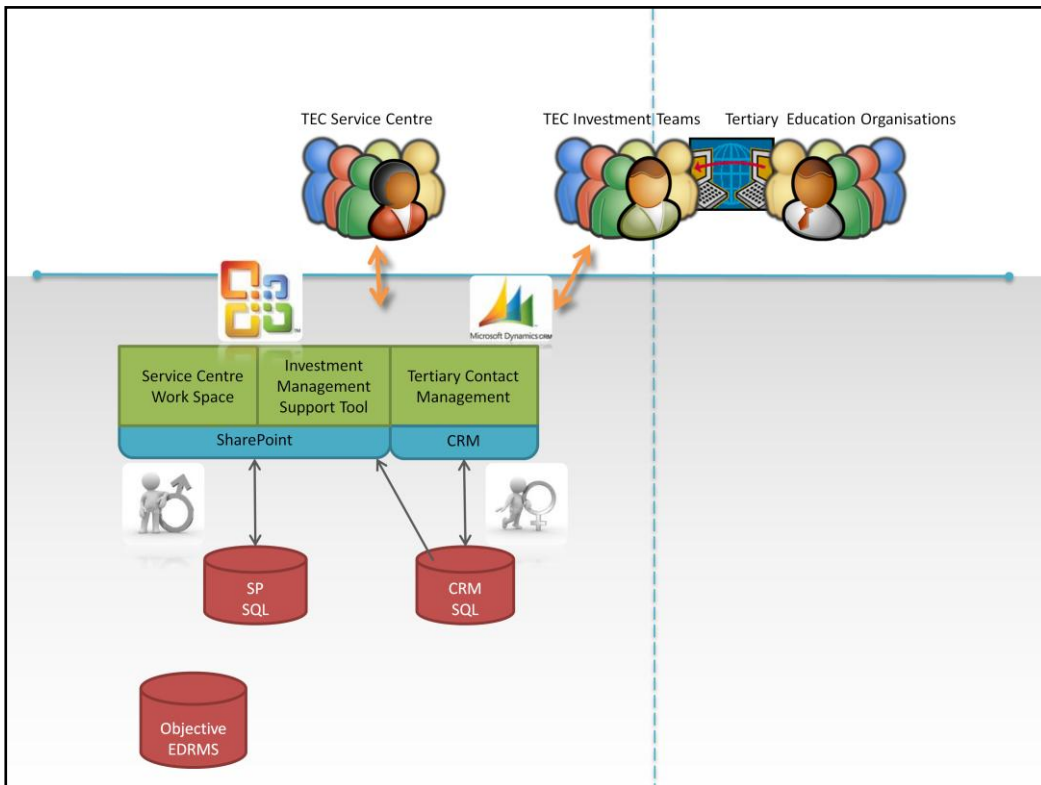
TEO contact management with CRM integrated with Outlook

Click 2 = walk

Simple role-based workspace which was essentially a TEO-centric document library with a web-part to CRM to bring up TEO contact details

Click 3 = run

Service centre case management in CRM so had a more complete picture of TEO-related interactions through an easy to use interface
Payment scheduling and authorisation in CRM for selected TEOs and funds – began to add in the payments aspects to the TEO picture
Piloted a second workspace for the Service Centre providing easy access to CRM as well as other Call-Centre related information from the IVR and reporting system



So this is what we ended up with by the end of 2007.

Artistic impression of roles to the technology platform and the underlying data stores

Note that for the purposes of this slide, the business process emphasis is on the Planning and Investing – i.e. the earlier phase of Analysing Need and subsequent phase of Monitoring Performance are not expressed here.

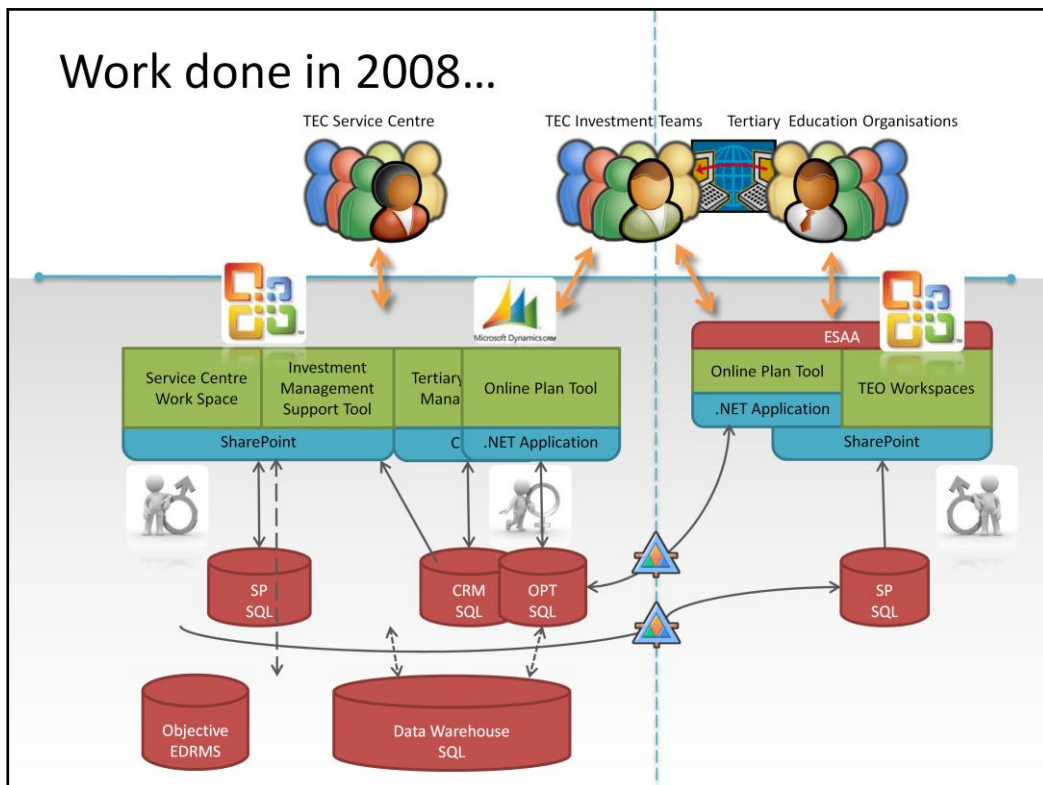
Greatest benefits

- emails able to be tracked in CRM so have a TEO-centric view of interactions
- TEO details centrally maintained in CRM
- all service desk phone calls also tracked in CRM as Cases
- 70% of payments scheduled and authorised in CRM against the applicable TEO

Issues:

- Email is the primary mechanism for exchanging information and data between the TEC and TEOs for applications for funding.
- Only some TEOs
- Only some funds

Click = transition



In 2008 we built on the tools to support the Planning and Investing business processes.

Again the earlier phase of Analysing Need and subsequent phase of Monitoring Performance are not expressed here.

Click to enlarge...

Benefits:

- email no longer the primary mechanism for exchanging fund application data and information
- structured data now collected online through the secure extranet in the DMZ
- utilise ESAA – education sector authorisation and authentication system
- CRM integration in the TEO Workspaces – TEO details

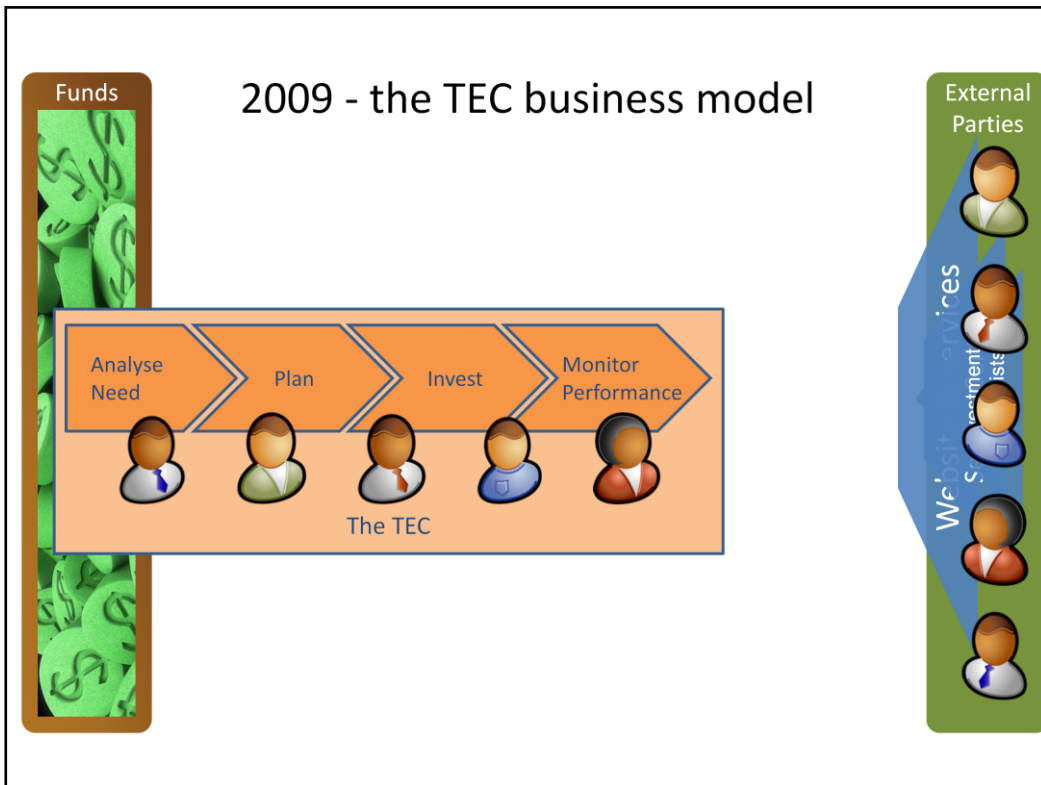
When the workspaces were implemented we recognised that it was important to preserve the single logon the education agencies use for their externally facing systems. The Education Sector Authentication and Authorisation (ESAA) is a system that uses the Sun Identity Manager and Access Manager for Identity and Access Management. These products have been integrated with SharePoint using SharePoint’s membership provider model. ESAA is used as a 3rd party authentication provider, thus preserving the single logon functionality already available in the education sector.

- TEO and TEC access same underlying data store – TEO fund application information as submitted to the TEC; The TEC recommendations and approvals recorded against the TEO submissions

Issues:

- Not all TEOs
- More funds but still not all applications for funding
- Still not able to get a definitive TEO-centric view due to other legacy systems still in use

Click to reduce...



The focus for 2009 is to look more holistically and end-to-end across the TEC's core business processes (analyse need, plan, invest, monitor performance)

To date work has been done solely in the Plan and Invest areas.

In 2007 the focus was on 110 largest TEOs (Unis, etc) and a handful of funds.

In 2008 the focus was on about 800 smaller TEOs (PTEs, Schools and Community Groups) and a further handful of funds.

Auto transition...

Now needed to integrate the processes across all TEOs, and include all funds (some are still processes manually)

Also need to bring in and integrate with the Monitor Performance processes as well as the Analyse Need processes.

So far this year we have published our first ISSP and restructured IT to include a Strategy and Portfolio Management Group, of which I am a part.

Three big tasks for the year

- Target State architecture, from business processes down to infra-structure.
- Focus on enduring enterprise capabilities – aligns to initial vision. Capabilities are the combination of people, process, policy (with a little 'p'), information and technology
- Leverage our online presence more to deliver known and repeatable services

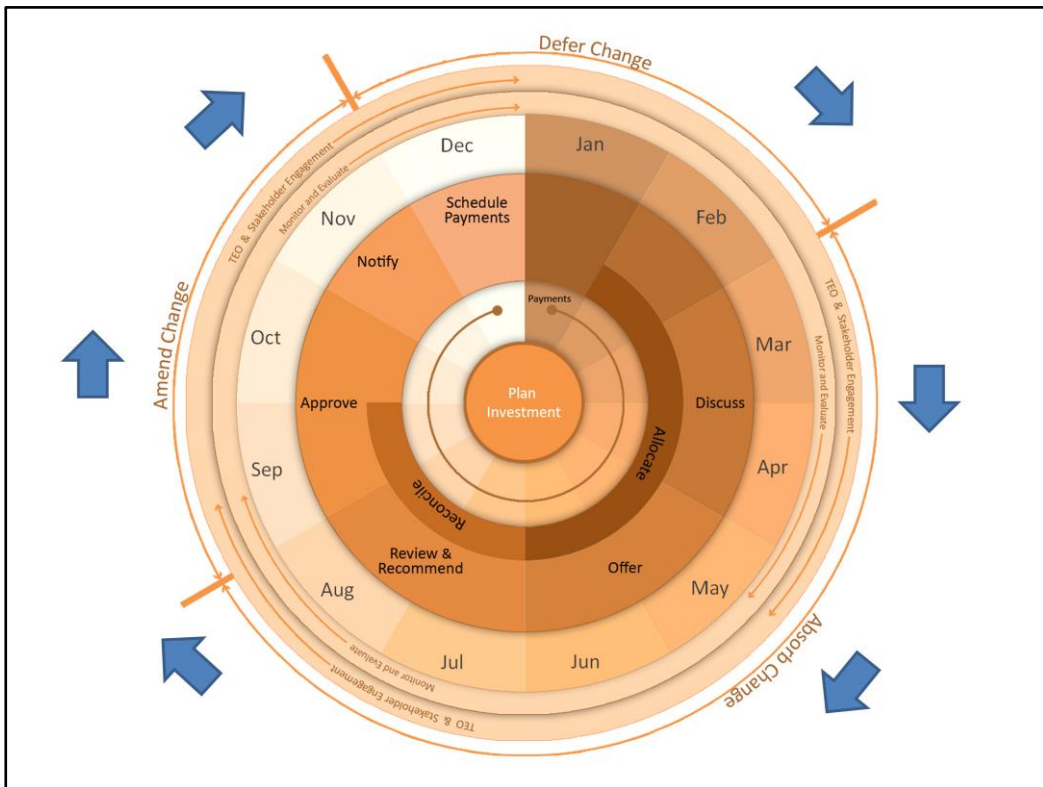
And like many government agencies, TEC has been through a line-by-line review, and as a consequence, we have reduced staff numbers by 23%.

In July last year we had a change of Chief Executive, and together with the new



Now let's take a look at the heartbeat of the TEC...

Auto-transition



This is our annual cycle.

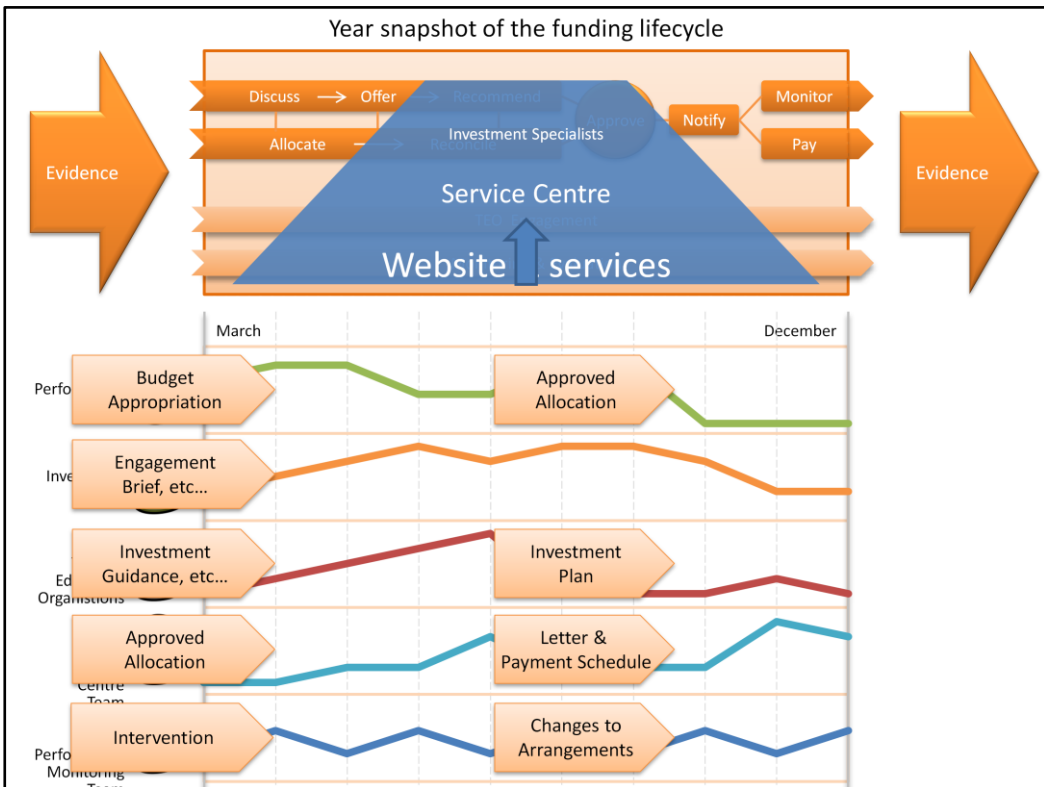
Throughout the year we make payments to TEOs and monitor their performance, as well as the performance of each sub-sector (Unis, PTEs etc) and the tertiary system as a whole.

In May, post the Budget (with a Big B) announcements, we indicatively allocate the budget appropriations to sub-sectors and then further to individual TEOs, based on performance, as part of our planning process.

In July we typically receive applications for funding from TEOs.

By October we have made our final funding decisions and let the TEOs know how much funding to expect over the coming year.

Auto transition



Key to all our processes is our information asset

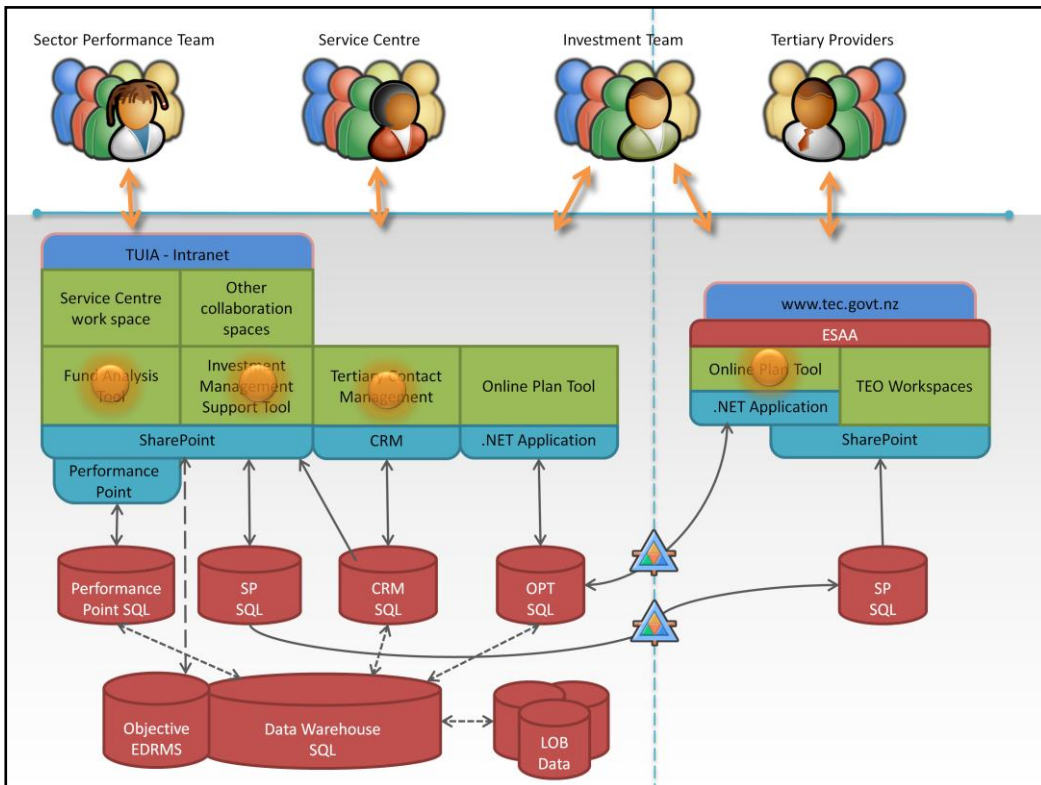


So what does this well-oiled machine look like?

I'll hand over to Mark Orange from Intergen to talk about the eco-system at the TEC.

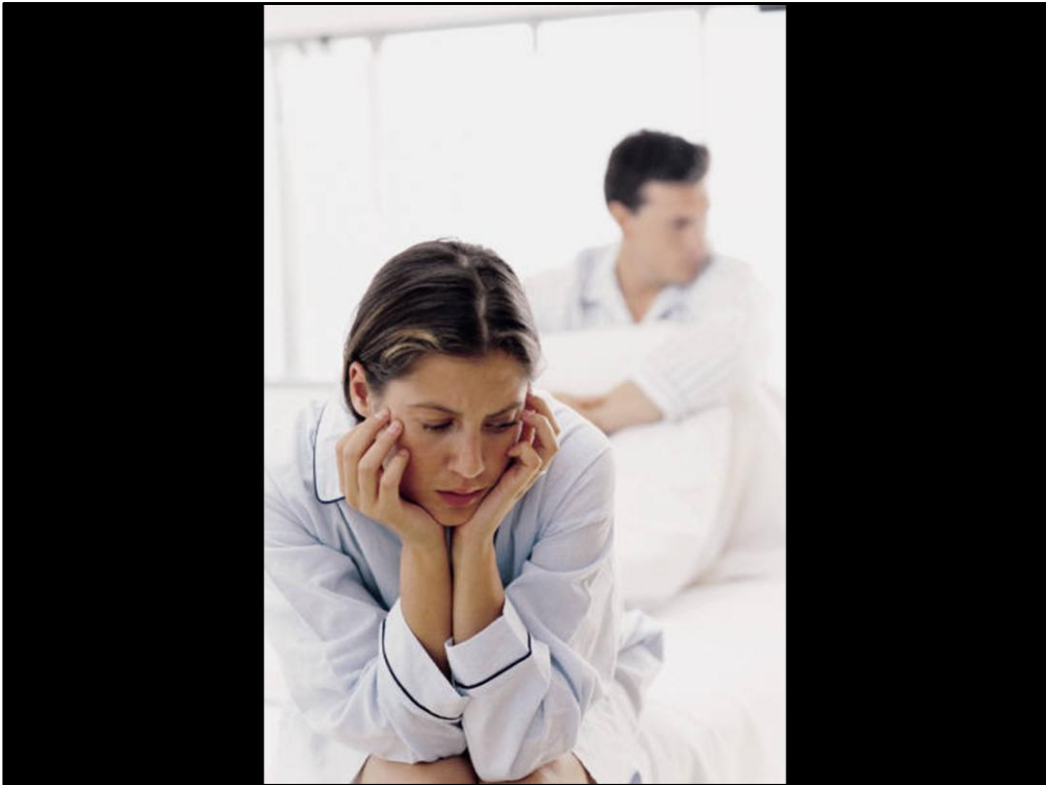
Intergen are currently our preferred supplier for Microsoft-related products and services, and have been since 2007, so this is a journey the two organisations have very much taken together...

[Click to transition](#)



Artistic impression

Emphasis on the Plan and Invest aspects of the TEC business model – still need to do Analyse Need and Monitor Performance



It hasn't all been plain sailing...

Learning where Dynamics CRM and Microsoft SharePoint work at their optimum is an ongoing challenge.

They have distinct and complimentary strengths and weaknesses, but they also have some strengths and weaknesses that overlap.

Where they have overlapping strengths, it's a question of "who" should be the leading technology providing the services, e.g. the window into the TEO-centric view of all related information and data.

Where there are overlapping weaknesses, particular attention needs to be paid to managing any risks presented by these weaknesses, and we have had to incorporate other technologies into the mix, for example K2 for concurrent or complicated workflows.

And at times, even with the best of intentions, Dynamics CRM and Microsoft SharePoint just don't play nicely together, e.g. when setting up our TEO-centric workspaces in 2007, there was no easy way to create each TEO landing page based on the TEO identifiers stored in Dynamics CRM, so that we only needed to maintain this info in one place – namely Dynamics CRM

Click to transition



But despite these differences, be they idiosyncrasies, strengths, weaknesses and foibles, we know that like any partnership, it's important to keep the dream alive.

Always keep the vision out in front.

Keep checking that you are both headed in the same direction.

Always know and agree what you are aiming for together.

Click to transition



We are slowly but surely learning the steps and developing capabilities, be they skills and knowledge about the products and ourselves, or the from voice of experience.

Sometimes that means stopping what you are doing and re-learning some steps; or learning a whole new dance because the last one you tried was just awful.

You need to agree who is going to take the lead and stick with it. Here are some of the principles we follow:

Microsoft SharePoint

TEO Portal - aggregating data (sometimes from CRM) and presenting it to TEOs

Document Distribution - all documentation, both general and targetted to specific TEOs, are distributed using SharePoint Document libraries

External Web Presence - despite deciding to use EpiServer for the website the longer term vision is for SharePoint to be the technology platform to deliver all web content

Collaboration (future) - to allow TEOs and other related external parties to collaborate on projects

Dynamics CRM

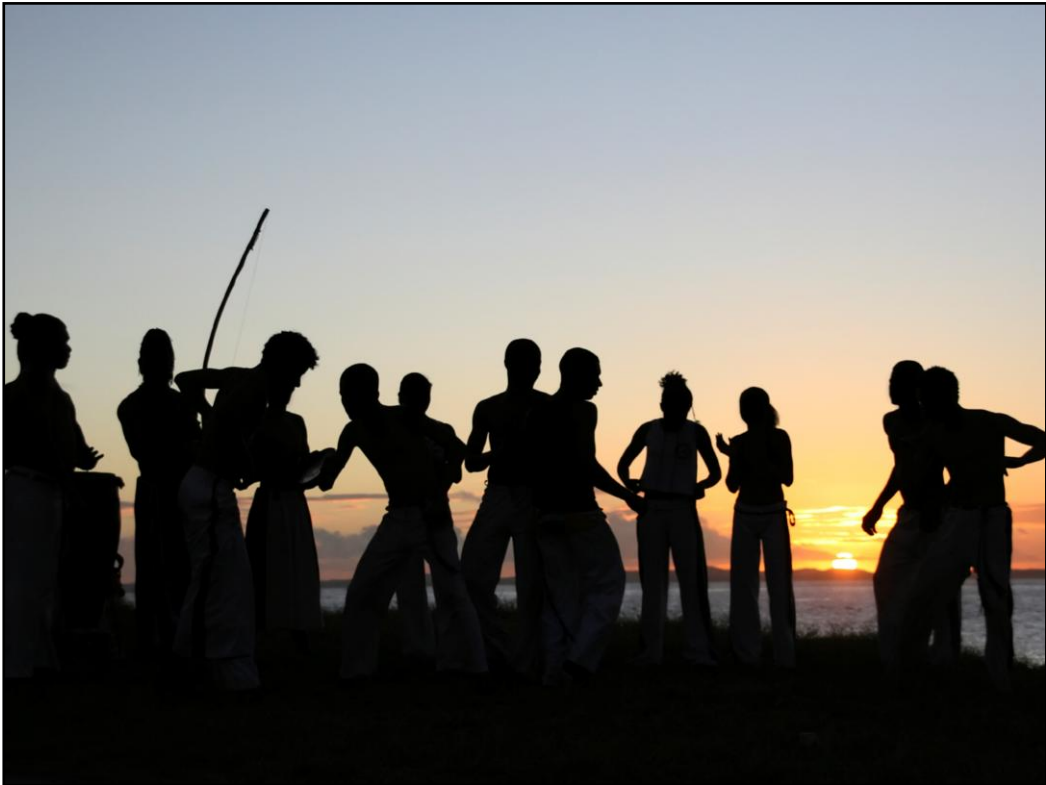
Internal Portal - CRM is increasingly being seen as a portal technology. We use CRM to present TEO-centric information (including reports) to Service Centre users.

Master Data Repository - is becoming the central repository of more than just TEO information. We see it as the logic place for master data on, for example, Funds and KPIs.

For Managing All TEO Interactions - we now automatically create cases when we receive emails from TEOs – more timely and accurate interaction tracking

Learning the steps in the relationship dance is also true of the TEC's relationship with InterGen, and how a trusted partnership relationship works and works well.

We have both had to learn, sometimes the hard way, how to work together to get the best out of this partnership of people and technologies.



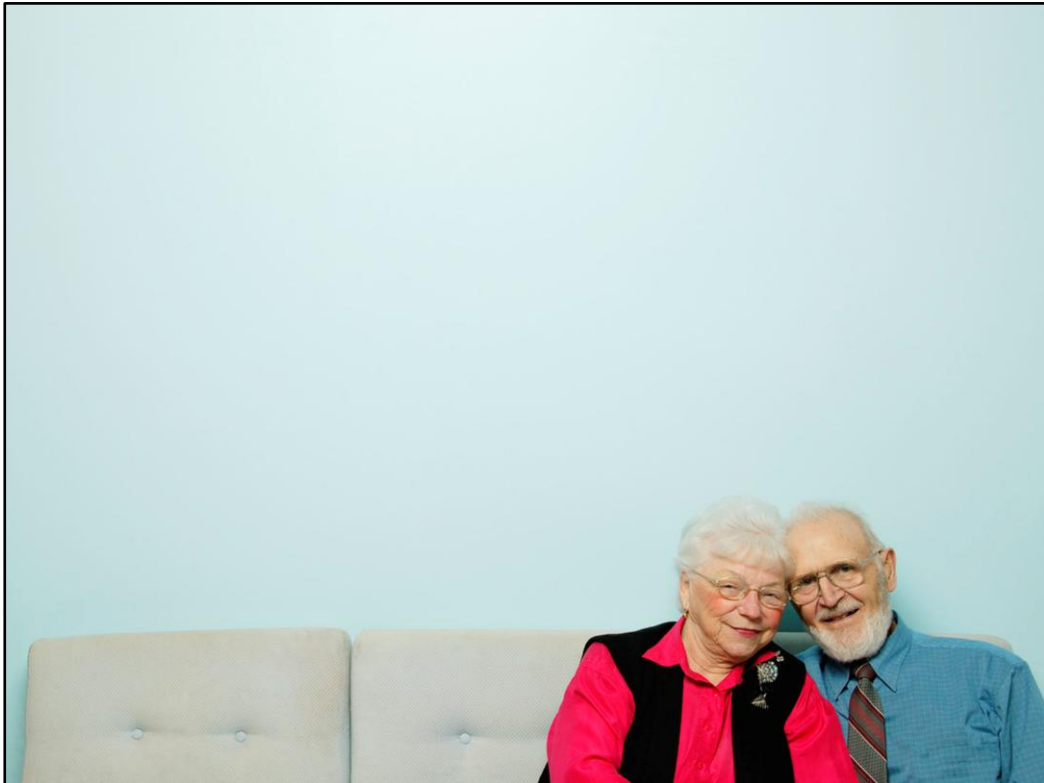
Ultimately the steps will be learned and will become embedded.

Before you know it, this will all be intuitive.

This will lead to greater leveraging of the products we have invested in, and greater innovative use to suit our organisation.

Some of the enterprise-wide activities we are currently focussing on right now are:

- Information architecture (website, intranet, EDRMS)
- Ensuring our enduring capabilities understood, based on the TEC business model
- Recognising the IS only a part of the picture – people, processes and policy have equal import and are essential for successful service delivery.



What is **GREAT** about the products?

TUIA Intranet - Implementation of the solution on Microsoft SharePoint was actually very easy and **didn't require any developer resource**, and was reasonably quick and cheap (once we got clear on what we wanted).

Enhanced TCM project - great example of using core CRM functionality to deliver business value (email to Case conversion)

Faster Delivery - by using functionality built in to the products we can bypass traditional deployment environments and speed up our time to production (OJ knows what I mean here)

What **challenges** were there?

Overhead of managing SharePoint environments

Knowing when to Customise and when to Configure - SharePoint can do anything a bespoke app can do BUT that doesn't mean you should do it as it can sometimes be more difficult/complex to achieve. We always favour configuration over customisation (general principle for all products). This is easier for CRM since there are clearer boundaries around what is possible.

At the end of the day it's better together because you get a lot more out of a partnership than you would have if you hadn't.

Ultimately it's worth the compromises, and with each new release of Dynamics CRM and Microsoft SharePoint, not to mention the Office Suite, integration and user experience is improved.

We continue to look forward to the next episode...

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Thank you.

Any questions?