

## CRM for those who think outside of the square

How marketing consultancy VantagePoint gained a powerful CRM solution as well as big-business-style email, calendar, and tasks - all with just one piece of software...



Just like the vast majority of start-up ventures in New Zealand, marketing consultancy VantagePoint launched with simple POP-based email. Employees got by with a mixture of mostly 'free' software such as Outlook Express. When it came to CRM, VantagePoint opted for the popular entry-level product ACT.

VantagePoint had its genesis as a one-man consultancy. Founded in the mid 90s by managing director David Lewis, 'Lewis Consulting' was re-branded as VantagePoint in 2001.

### Suit that no longer fits

Technology wise, all would have been rosy for VantagePoint if the company hadn't grown dramatically. When it did, suddenly all of the company's technology seemed strained. A permanent shared record of email, and other important communications with clients was conspicuously absent. Nobody could view anyone else's diary, task delegation was impossible, and in short every consultant was an island. This was not the culture that the founder had in mind.

VantagePoint had to face the music. It was still a small business, but it had morphed into an organisation with industrial strength needs. VantagePoint's disparate workforce - a collection of full and part-time contract staff, working both on and off site, as well as from home offices - presented a fundamental challenge.

"Things were fine when it was just me as the primary contact point for the clients, but with three or four consultants dealing with a single client, things quickly became a logistical nightmare," says Lewis.

### Two birds, one stone

It was at about this time that Wallace Gracewood - VantagePoint's IT manager, approached Crossware - an Auckland based IBM reseller.

The first question he asked the potential supplier was: "How small do you go?" Could a firm of VantagePoint's size really afford to buy from Big Blue?

VantagePoint had arrived at a familiar crossroads. Clearly it had outgrown its IT infrastructure and it stood at the spot where most Kiwi organisations bite the bullet and shell out for expensive-to-own server

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### About VantagePoint

VantagePoint is a boutique researchbased marketing consultancy that formulates marketing strategies and tactical campaigns to help its clients to grow .  
Visit [www.yourvantagepoint.com](http://www.yourvantagepoint.com)

### At A Glance

#### Business Objective

VantagePoint needed to more effectively manage its client relationships. The company required corporate- strength CRM and PIM [email / scheduling / tasks and delegation], but it wanted to achieve all these things without a large investment in infrastructure.

#### Solution

IBM Domino hosted by Crossware.

#### Business Benefits

All client information, including emails, is now captured in one central location. Staff working from home or anywhere else have full system access both online and offline. VantagePoint is also able to manage the business better, centralising much of its key business information.

hardware and messaging systems.

Lewis realised that another in-house server was the last thing the business needed, but he had found a way to deck two birds with a single stone.

IBM Domino, hosted by Crossware, would provide a powerful CRM solution as well as delivering big-business-style PIM (email / calendar / tasks) all with just one piece of software.

### **Hosting, but not as you know it**

"Be very careful with the expression hosted" says Crossware's sales director Ken Fairgray - "This is not a typical hosted solution. Normally when you say 'hosted solution' everyone imagines systems that are accessed via the web, using Internet Explorer."

"We ended up supplying a hybrid solution - VantagePoint got all the benefits of outsourcing, such as a top-end server located and managed off-site at Crossware, however back at the coal-face users get to enjoy a rich, fat-client experience without the feature limitation of IE."

"In this hybrid scenario the web is merely a background vehicle allowing communication with the outsourced server" explains Fairgray.

So what does fat-client mean in practical terms? "Put simply this means top speed, featurerich applications," says Fairgray. "Best of all, laptop access to absolutely anything from literally anywhere, and here's the kicker, all this with no internet connection required."

"Robust off-line access was a major drawcard for IBM Domino" says Gracewood. "We bucked the trend and managed to side-step the expense and hassle of setting up a VPN - virtual client network"

"As far as the clients are concerned, they have no idea whether our consultants are in or out of the office. The new set-up enables consultants to be just as connected and productive, no matter where they are working from."

### **Out of the office**

For Lewis personally, full out-of-office productivity means being able to get home in time to put his young son to bed, before logging back onto the system and working from home. "In the old days attempts to work from home were frustrating, too many components were just not available at my house," says Lewis.

Lewis says he is now confident that VantagePoint owns the IT systems it needs to keep pace with its continuing expansion. "We are still not as big as we intend to be, but we felt it was important that we got the structures in place to accommodate future growth."

VantagePoint has recently enhanced the original Crossware system to assist with project control and resource planning. "Our aim is to plan the work load of our consultants out for several months" says Gracewood. "If we had brought a CRM package off the

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- [The Edge gets smart with IBM](#)
- [CRM ride on for Avanti](#)
- [Montana's secrets ripe for sharing](#)
- [Ricoh NZ deploys 'jump start' CRM solution](#)

shelf there would have been no way we could have done this type of thing.”

Crossware’s solution helps VantagePoint to predict what is going to happen in the future, it helps the consultancy to focus on the right jobs, bring in the right people, manage priorities and finally, to review whether client expectations have been met.

**For more information**

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