

Port Stows Away Institutional Knowledge

Faced with exiting senior staff, Port Taranaki is marshalling its institutional knowledge with an innovative contract and contact management solution...

Port Taranaki has a unique business problem. A number of key staff are nearing the end of their working lives and, as they sail off into the sunset, they'll be taking a great deal of institutional knowledge with them.

To avoid having to interrupt their retirement with bothersome questions concerning processes only they know about, the company is capturing vital intelligence about the business before it walks out the door.

The two key types of information it is intent on retaining are all the details of people and organisations port staff deal with day to day, and the in and outs of contracts between the port and its customers and suppliers.

Both sets of data are being collected in a customer relationship management (CRM) system developed by Auckland company Crossware using IBM's Lotus Notes software. And the process is being managed by port long-timer Robin Aitken, recently retired from the position of Cargo Services Manager.

The situation comes about through the port's conservative approach to information systems, Aitken says.

"We're very much a traditional company. We were the Taranaki Harbours Board for many years, then we became a port company, called Westgate, when government legislation changed the whole waterfront industry.

"Now we're called Port Taranaki Limited, so we're a port company, but with a lot of residue of the old days."

The Taranaki Regional Council-owned business has been well run, Aitken says, but many of its systems and knowledge have existed in a "rough and ready" way.

"The company is making a major effort — last year, this year and next year — to put in modern IT systems that will enable it to carry out the business in a much more efficient way, like most large modern companies already have in place.

"It's that combination of things — the realisation that we do really need to come up to date a bit, as well as the loss of the experience of the people who have

managed to make it all happen over those years."

Aitken's responsibilities at the port had been management of container and bulk cargo movements — "anything that didn't go down a pipeline". But he is now part of the team working on what the port dubbed its CORE (short for "contract revolution and contract revelation") IT project. Rehiring him as Project Manager is indicative of the company's new thinking.

"I think they realised that they've tried to do so much for so long using their own staff, but really, people don't have the time to do these things these days. So they thought if they bring in someone with a bit more time on their hands who could just keep things moving along, then that could be helpful.

"So that's how I've stayed involved."

The project was split in two — into contact management and contract management parts. Implementing a much-needed contact management system was tackled first.

"We've been embarrassed — and I'm sure other companies have in the past — to send communications out to people who have moved on to other organisations or, heaven help us, who've died... and back comes a letter saying Joe Bloggs has passed on."

Users of the 60-odd desktop computers around the company each had their own contact list in Microsoft Outlook and, when IT combined them, along with contacts from the port's debtors, creditors and asset management databases, there were more than 22,500 names. But most were duplicates.

"One example was a man well known in the port area and when we pulled all the contact lists together we found eight versions of the spelling of his name."

When the list was culled, it was reduced to 2500 names which Aitken says has become the "bible" for company business.

"Crossware has provided us with the CRM system to pull it all together."

Contract management, to which Crossware has now turned its attention, was equally shambolic. Agreements with the port's 330 or so customers and



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Robin Aitken,
Project Manager.



CASE STUDY

> Port Taranaki

AT A GLANCE

Business Objective

> Port Taranaki — with 125 staff, 600 shipping movements a year and throughput of 65,000 containers — needed to modernise management of its contacts and contracts as institutional knowledge was about to walk out the door through the retirement of long-term employees.

Solution

> IBM Lotus Notes-based customer relationship management system.

Business Benefits

> Informally kept contact lists on scores of desktop computers and in finance and asset management systems have been consolidated in a business “bible” used by all staff. Using the same CRM, a contract management system has been developed that lets staff collaboratively write agreements with customers and suppliers, according to a formal workflow and following built-in pricing rules.

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suppliers were typically “loosely” arrived at and recorded, Aitken says.

That didn’t mean there were lots of disputes, just plenty of muddle.

“In a perfect world you’d have a contract with everyone. Well, that’s just silly — you don’t do that for somebody to deliver the toilet paper.”

But as “an old-fashioned conservative company coming into the 21st century”, there were some basic contract management controls that needed to be put in place.

That included the ability for everyone involved with a contract to be able to peruse it and have input before it was signed, so that, for example, the business development side of the organisation wasn’t making promises that weren’t operationally possible.

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the port, we enter all the details into the CRM, everyone gets involved, there’s a workflow to follow and we bring the contract to fruition.”

“Senior management are given the tools to make good objective decisions,” Aitken says.

Aitken is dismissive of his own IT background — “I was chosen for this contract because I’m the least computer literate person at the port” — but says a long-time IT consultant to the port sings Crossware’s praises.

“She summed it up very well and said that in 30 years in the industry she had never come across a company like Crossware — for responsiveness, for attention to detail, for understanding the customer, for everything.

“From my point of view, as a layman, I echo that.”