



**Microsoft Customer Solution**

**Case study**

**Microsoft Office 2003 Forms Customer Relationship Management Answer for The Temporary Alternative**

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**Cathy Fanning**  
 Director  
 The Temporary Alternative

Located in Melbourne and providing services in three key areas – IT training, IT consulting and customised virtual office services – The Temporary Alternative (TTA) is an Australian small business success story. Company founder and director, Cathy Fanning, has taken decades of experience in small-to-large business IT services and created an organisation that has as its aim: “the provision of skills and services that dramatically enhance client competitiveness”.

“In any business – regardless of size – information is critical,” Fanning says. “The main thing about information though is that it needs to be accessible and above all, useable. Microsoft Office Professional Edition 2003 with Business Contact Manager has given me the ability to exploit information and use it to benefit my company by means of improving customer relationship management and simplifying many of the day-to-day activities that are inherent in running The Temporary Alternative.”

CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
The Temporary Alternative operates in Melbourne and provides IT training, IT consulting and virtual office services. The company's director, Cathy Fanning, is a strong believer in the critical nature of information in any sized business.	In order to exercise greater control over information, Fanning had been looking to implement a small business customer relationship management (CRM) solution for well over a year.	With the release of Microsoft Office 2003 and, in particular, Microsoft Business Contact Manager, Fanning ceased trialling CRM software in favour of the new application with its tight Office Outlook 2003 integration.	<ul style="list-style-type: none"> <li>Instant access to client and project information.</li> <li>Easy and quick mail merge for targeted marketing mailouts</li> <li>Ideal small business CRM solution</li> <li>Easy transition from earlier versions</li> </ul>

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**Cathy Fanning**

Director

*The Temporary Alternative*

## Situation

Like the vast majority of small business principals, Fanning devotes an enormous amount of her time to the mechanics of keeping her business operating. Finances, client management and marketing are just a few of the areas that, while managed by individual people and even departments in larger organisations, all fall within the area of responsibility for the small business owner.

“Keeping on top of all the tasks I need to complete means managing time and information,” Fanning states. “In big business this is typically carried out with large – and expensive – CRM [Customer Relationship Management] solutions.”

To bring about a CRM-type solution for her own business, Fanning researched a number of software systems promoted as being designed specifically for small business. She had even undertaken a small pilot program to evaluate the suitability of one system that appeared to hold some promise. The major stumbling block was the system’s inability to integrate adequately with her existing Microsoft Office 2000 applications.

“I spend a lot of time in Outlook and other Office applications, such as Word and PowerPoint, and everything I do within those applications I consider as information that needs to be tracked,” Fanning says. “Whether it’s sending an e-mail, creating a document, entering a journal entry – which I do for every business phone call, letter sent, meeting etc – or scheduling a meeting, it is all valuable information that I call upon constantly in dealing with clients and other business activities.”

Fanning’s requirements boiled down to an application that afforded her a single view of all dealings The Temporary Alternative has with its clients. “I regard information as one of my most important business

resources,” she says, “and as such, need a tool that lets me drill down on any person or business record on every e-mail, phone call, meeting or any other dealing that has gone on between us.”

## Solution

As a trainer in the application of Microsoft Office within business, Fanning paid close attention during the early part of 2003 to the information being released by Microsoft about the upcoming release of the Microsoft Office Editions 2003. “Aside from the need to keep abreast of new releases of applications for which I’ll eventually be asked to provide training, I was very interested in the new version of Outlook and, in particular, Microsoft Business Contact Manager,” she explains.

When the opportunity arose later in the year to participate in the Microsoft Office System Rapid Adoption Program, Fanning was selected as one of a handful of Australian small businesses to be part of the Program.

“One of the first things that impressed me about this new version of Office was its simplicity of set-up,” Fanning says. “Even though I’m competent in the installation of new software, I’m still very critical of standard desktop applications that require the user to bring in outside help. Most small business owners simply lack the financial resources to pay a specialist to come in just to install a desktop application that is available off-the-shelf.”

Within a week of installing Office Professional Edition 2003 Fanning put an end to the CRM pilot program and had Business Contact Manager established in its place. “Once I had installed Office 2003, with Outlook 2003, it took barely five minutes to install Business Contact Manager, with the result that I had a CRM

solution that did more than integrate with Outlook – it was a part of Outlook,” she says.

## Benefits

For Fanning and her staff to fully utilise the CRM-type capabilities of Business Contact Manager, they employ a strict policy of recording all events and activities that relate in any way to a client or job. “Whether it’s a phone call, meeting or e-mail, Outlook’s journaling is used to record the specifics,” Fanning says. “As soon as I take a call from a client I start the timer so I can track exactly how long I’m on the phone for and what was discussed. When I get back from a meeting I do a ‘brain dump’ in Outlook and record it against the company or person with whom I had the meeting.”

“It is quite usual for me to be working across several clients at any given time,” she says. “I might be on the phone, talking a client through a series of steps in QuickBooks and at the same time, printing a set of hand-outs from PowerPoint. The information capturing facilities of Outlook and the integration between all the Office 2003 applications means I’m able to record concurrent actions with an absolute minimum of effort. I can associate a Word or PowerPoint file with a contact and have Outlook’s journaling automatically record its use.”

“It’s a case of having information on-hand whenever I need it,” Fanning explains. “When a client calls me to check on the progress of a project or an update on exactly how long I’ve spent on-site, I can let them know immediately. The result is that the impact on my time of client queries is much less than it has ever been and I would estimate that I’m now saving anything up to half-an-hour every day by avoiding the need to manually sort through masses of files and papers. Even more

importantly, my clients are very impressed with the immediacy of my ability to react to their requests. Essentially, Office 2003 has given my company an enormous boost in its professional appearance.”

## Improved Customer Communication

Fanning’s business operates in an environment she describes as being “fiercely competitive”; and the need to maintain some form of regular contact with clients and prospective clients is something she regards as essential. “You have to really keep on top of your business profile with clients,” she says. “All too often it’s a case of the person they think of to bring in on a job is the person they last met or spoke to on the phone or had recently sent them a newsletter.”

For Fanning, all three of those profile-building exercises are part of The Temporary Alternative’s day-to-day business. With Office Word 2003 and Business Contact Manager, the correspondence exercise has become all the more easy and efficient. For several years, Fanning has maintained a regimen of creating regular advice-type letters for her clients and prospects. “I’ve always used Word’s mail merge facility to personalise the letters,” she says, “but with this latest version – especially when used with Business Contact Manager – the whole exercise is easier and above all, much more effective.”

“The integration between Word and Business Contact Manager means that I’m able to create mail merged documents based on an extremely flexible set of criteria. It’s simply a case of identifying the right contact category – such as prospective clients, Microsoft Office trainee, QuickBooks user or combination of any of them – and the result is a targeted mailout that takes only a matter of minutes rather than hours if I resorted to a manual system.”

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**Cathy Fanning**

Director

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### Simplified Training

With many years experience in training business people in the use of software, Fanning applies a very simple rule-of-thumb to assessing the suitability of software for her clients; it has to be easy to use, highly effective and aesthetically pleasing. "I don't rely on studies or reports to tell me how the presentation of an application will impact on its acceptance by a user," she says. "I know that if the person I'm training actually feels comfortable with a program, then my job is much easier right from the start."

"I've already noticed the impact of this on my own staff. Making the transition to the new version of Office required virtually no effort on my part. As soon as it was installed, everyone commented on the new look and even started exploring new ways in which they could use some of the new and established features."

"It is much more than individual features that have made Office 2003 an essential business tool within The Temporary Alternative," Fanning says, "it is the

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### For More Information

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