

Case Study

Young Enterprise Trust

» Fujitsu really understood our business and that’s why they could design and deploy such an ideal CRM solution «

Terry Shubkin, Chief Executive, Young Enterprise Trust



The customer

The Young Enterprise Trust is a charitable organisation dedicated to growing a more prosperous New Zealand through enterprise. Founded in 1981, its purpose is to help the economic growth of New Zealand by providing a range of programmes and resources to schools. Its aim is to ensure that all students participate in experiential enterprise education – learning how to be an enterprising person – and financial literacy programmes. Young Enterprise works with schools all over the country and connects with close to 50,000 students each year.

The challenge

Thirteen years ago, Young Enterprise built a home grown programme-based CRM solution using Access Database. This comprised different programmes with specific databases allocated to each one. This made it difficult to get a holistic view of a school as the database was programme-centric rather than customer-centric.

“The system wasn’t customer focused so we didn’t have a view of all stakeholders; we couldn’t tag them or filter them. Sponsorship was tagged to an individual, not a company within the original database. If someone left, the sponsorship would disappear,” explains Terry Shubkin, Chief Executive, Young Enterprise Trust. *“We have a wide and diverse stakeholder group. We communicate with schools, teachers, volunteers, mentors and alumni. One person can hold multiple different roles and the old system made it difficult to see all the connections. Furthermore, the system was not scalable and had no service support or updates available.”*

There are almost 3,000 schools in New Zealand and Young Enterprise is actively connected with over half of all secondary schools and close to ten per cent of primary schools. Each school is either a current, past or potential Young Enterprise school and there are many contacts within each school. Young Enterprise needed a way to easily contact these schools and specific groups of people within each organisation.

“Every school is at a different stage; some are involved, some are not involved and others are interested in getting involved. We needed a way to track which stage each school was at,” adds Shubkin. *“Moreover, the registration process for schools was difficult and tedious. There was a pressing need to easily track the number of schools and students involved as well as the different stakeholders such as volunteers, alumni and sponsors.”*

THE CUSTOMER

Country: New Zealand
 Industry: Charity
 Founded: 1981
 Number of employees: 14
 Website: www.youngenterprise.org.nz



CHALLENGE

Young Enterprise Trust was saddled with an outdated legacy database that was severely lacking in functionality, making it difficult to manage communications with stakeholders. It needed a new approach that would be scalable, flexible and future-proof.

APPROACH

Working with Fujitsu, Young Enterprise deployed Microsoft Dynamics CRM, a customer relationship management suite comprising contact management, service management, sales management and marketing management capabilities.

THE BENEFIT

- The new solution offers Young Enterprise a consolidated customer-centric view of its data, enabling users to differentiate between the diverse set of stakeholders and sort them into multiple categories
- There is more structure and total visibility across the organisation - all support staff can access details of all stakeholders within the CRM system
- New reporting abilities mean Young Enterprise can produce accurate data for board reports
- Young Enterprise can track the status of schools and teachers and what they are involved in at any point in time, making communication more relevant and efficient

PRODUCTS AND SERVICES

- Microsoft Dynamics CRM

The solution

Young Enterprise turned to Fujitsu for advice. It recommended Microsoft Dynamics CRM, a customer relationship management suite comprising contact management, service management, sales management and marketing management capabilities that are fast, familiar and flexible. It helps organisations of all sizes to establish, track and effectively manage relationships by providing a 360-degree view of interactions.

For Young Enterprise, Microsoft Dynamics CRM facilitates school, teacher and student registration and relationship management, including recording exam results/NZQA qualifications obtained and award/competition entries and finalists. Young Enterprise also uses CRM to help manage stakeholder communication, service requests, feedback, sponsorship contracts, donations, events and courses. In fact, the new solution manages a large proportion of the day-to-day activities undertaken by the Trust.

"Fujitsu understands good IT practice for implementing solutions. My background is in the ICT industry so I was well aware of Fujitsu's reputation and trusted it to do things properly and deliver a quality service that would meet our needs," continues Shubkin. *"We knew this new Microsoft platform would be best-of-breed and future-proofed to enable us to grow and evolve."*

The benefit

The new solution now offers Young Enterprise a consolidated customer-centric view of its data. Linkages enable users to differentiate between the diverse set of stakeholders, sort them into multiple categories, and track them. There is more structure and total visibility across the organisation - all support staff can access details of all stakeholders within the CRM system.

"Previously, we had to rely on an individual's knowledge of people within the original database so if someone had left a company, that might not have been registered on the database," comments Shubkin. *"Now we all have up to date information to hand which can be categorised and sorted however we choose, making us more productive."*

The new solution is also providing more functionality than was initially expected and is exceeding all the Trust's expectations. It is equipping Young Enterprise with the ability to create a comprehensive business strategy, to better market events and to better manage stakeholders.

Conclusion

"Fujitsu really understood our business and that's why they could design and deploy such an ideal solution," concludes Shubkin. *"We are also very impressed by how Fujitsu updates the system within two hours when changes need to be made. And the new reporting abilities mean I can produce accurate data for board reports."*

"We can now track the status of schools and teachers and what they are involved in at any point in time, making communication more relevant and efficient. We can also send newsletters to selected audiences and create targeted campaigns."

About Fujitsu

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