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Leo Austin
Corporate Services Manager
New Zealand Young Enterprise



Fujitsu upgraded Young Enterprise to Microsoft Dynamics CRM Online, providing secure cloud-based access to critical information and enabling effective collaboration.

At a glance

Country: New Zealand
Industry: Charity
Founded: 1981
Employees: 18
Website: www.youngenterprise.org.nz

Challenge

In 2012 Fujitsu had successfully replaced Young Enterprise’s outdated legacy databases with a new CRM platform. The team spends a large part of the year on the road visiting remote schools and was finding it difficult to access critical information whilst on the move. In addition, the organisation was upgrading its website to become an integrated membership site, and integration into the CRM was a key requirement.

Solution

Fujitsu upgraded Young Enterprise to Microsoft Dynamics CRM Online to provide a cloud-based online portal where real-time data can easily be accessed.

Benefit

- Staff have remote access to data when they need it and the ability to collaborate on the move
- Streamlined and automated processes enable the effective management of 4,398 stakeholders and 14,105 individuals with a staff of just 18 people
- Communication is targeted at stakeholder groups and individual constituents while schools are recruited through more direct and tailored communication

Customer

Young Enterprise is a charitable organisation whose purpose is to inspire young people to develop their full potential in business and in life. It does this by helping young people to unleash their entrepreneurial spirit, develop critical life skills and realise that good financial decisions give you more choices in life. It has a range of programmes, resources and games for Year 1-13 around experiential enterprise learning and financial literacy. With the support of over 1,000 teachers a year from over 600 schools, it connects with close to 100,000 students each year. Its work is supported with close to 2,000 volunteers who generously give up their time to coach, judge and mentor.

Products and services

- Microsoft Dynamics CRM Online with web interface
- CRM Consulting, CRM Configuration and Customisation

Challenge

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 10 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.

To meet this objective, Young Enterprise built a home grown programme-based CRM solution using an Access database. This comprised of different programmes with specific databases allocated to each one, however, this made it difficult to get a holistic view of a school as the database was programme-centric rather than user-centric.

Fujitsu initially engaged with Young Enterprise as a key sponsor implementing and supporting 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 helped Young Enterprise to establish, track and effectively manage relationships by providing a 360-degree view of interactions.

However, although this new CRM platform was more efficient and enabled users to differentiate between the diverse set of stakeholders, sort them into multiple categories, and track them, it did not link to the existing website. This made accessing CRM data remotely challenging and measuring the results of specific programmes difficult.

Every year, teachers had to reregister on the website and even then, there was no way of linking the many online records with the CRM system. So, for example, tracking donations from sponsors or assessing the progress of certain initiatives was impossible from an online perspective. This limited users' ability to access information whilst on the move.

Young Enterprise knew it needed a flexible, secure, real-time interface between its CRM software and online access. Given its success with the original Microsoft Dynamics CRM deployment, the organisation turned to Fujitsu for advice.

Solution

Following the successful upgrade to Microsoft Dynamics Online, Fujitsu managed the integration of Young Enterprise's new website and CRM to enable automated enrolment, membership and registration for events. This involved the implementation of the upgraded Microsoft Dynamics CRM Online, a cloud-based holistic solution that integrates the existing CRM intelligence with a brand new online portal.

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For Young Enterprise, Microsoft Dynamics CRM Online facilitates school, teacher and student registration and relationship management, including recording exam results/NZQA qualifications obtained and award/competition entries and finalists. The organisation 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 deliver a quality service that would meet our needs," explains Terry Shubkin, Chief Excitement Officer at Young Enterprise. "We knew this new Microsoft platform would be best-of-breed and future-proofed to enable us to grow and evolve."

Benefit

Young Enterprise provides a great example of how CRM has been used, over time, as a platform for an organisation's data and to manage all sales, service and marketing activities in an integrated way. Now, Young Enterprise staff, who travel extensively, are connected and have access to data when they need it as well as the ability to effectively collaborate, regardless of location. "We used to rely on reports, but staff can now directly access the information they need when talking with a teacher," adds Shubkin.

Furthermore, because processes have been streamlined and, in some cases, fully automated, CRM Online also enables the effective management of over 4,000 stakeholders and more than 14,000 individuals with a staff of only 16 people. With so many stakeholders, many of whom have multiple roles with the organisation, communication is challenging. Depending on whether a person is a student, alumni, parent, volunteer, donor, sponsor, teacher or principal will change what type of marketing communication is needed. Without the CRM, it was impossible to be able to customise its interaction with thousands and thousands of individuals. In addition to the benefits around marketing and stakeholder management, the CRM has also made record keeping much more efficient and effective.

"Our auditors are amazed at the level of auditability of our revenue and business activities – we can query the CRM to provide full evidence of enrolment, membership, and sponsorship – which is rare for a not-for-profit," concludes Leo Austin, Corporate Services Manager, Young Enterprise.



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