

Microsoft®

Thought Leadership Profile: **Microsoft**



The power **to change**
Innovative tools help governments excel.



While it's always been true that government must contend with limited resources, the recession of the early 2000s and the staggering advancement of technology significantly magnified its challenges. Governments of all sizes find themselves struggling to serve more people with fewer funds while constantly playing catch-up with private-sector innovation.

But not for everyone. Some agency leaders are bridging their financial and technological gaps by leveraging existing technology investments and integrating cutting-edge software that offers exceptional affordability and functionality.

One example is Microsoft® Business Solutions. Designed to streamline a variety of administrative functions and improve constituent services, Microsoft Business Solutions is providing government agencies powerful, cost-effective tools that are quick to set up and easy to use.

Plain Great

On all levels of government, simply operating in the black is a daunting challenge. Old infrastructure and old ideas will not help agencies make the most of their limited resources. Microsoft Business Solutions for Financial Management—Great Plains has the tools and the torque administrators need to shift their financial reporting into high gear.

Designed as a series of individual modules, Microsoft Great Plains improves functionality in everything from core financials to human resources and grant management. Agencies can use some or all of the Microsoft Great Plains modules depending on their needs. For example, a human services agency could implement a financial reporting module alone or choose to employ the entire application system.

In addition, Microsoft Great Plains is typically far more cost-effective

than other Enterprise Resource Planning (ERP) solutions. Combining intuitive integration with other Microsoft products as well, as the capability to provide for a fast and simplified deployment, Microsoft Great Plains presents government agencies with an intelligent and exceptionally functional financial management solution.

How to Relate

Understanding what constituents need is critical to all public service agencies. Ideally people build their governments to serve needs of citizens. With Microsoft's Customer Relationship Management (CRM) application, government agencies shed the reputation for lackluster service and spotty responses.

As part of Microsoft Business Solutions, Microsoft CRM is a visionary product that can transform disparate agencies into efficient data-sharing enterprises. At the same time, constituent calls and requests can be tracked and shared, allowing the appropriate agency response to be faster and more accurate.

Built from the ground up and taking advantage of the company's standards-based .NET framework, Microsoft CRM is easy to implement and intuitive to use. In addition, the cost-effective solution can be set up extraordinarily fast; what takes others several years and millions of dollars to deploy can be implemented in mere months and for a fraction of the price.

Like Microsoft Great Plains, anyone who is familiar with Microsoft Office will instantly recognize the Microsoft CRM interface. The broad functionality of Microsoft Business Solutions helps make building improved architecture fast, effective and friendly — whether you're a constituent or a civil servant.

Public Service

California agency call center saves money with Microsoft CRM.

California is recognized as a trendsetter in everything from pop culture to biotechnology. In Sacramento, the California Department of Corporations is furthering the state's reputation for innovation by implementing the Microsoft CRM solution. The department was looking for an application that could track and display data that was coming into its call center.

Julie Stewart, manager of the Consumer Services Office at the Department of Corporations, said that its legacy systems were not conducive to constituent-friendly service.

The department had multiple databases, Stewart said. "When we first started the call center, none of them talked to each other. So if something became an issue, such as a complaint, it generated a ton of documents."

The Department of Corporations is responsible for the regulation, licensing and enforcement of franchises, investments, commodities and residential mortgage lending, to name a few. As a result of its customer-intensive business, the department receives a high volume of phone calls, many of which detail some kind of problem.

With a limited budget, Stewart created a call center to handle increased volume. With the call center operational, the department looked for a software platform that met its objectives. Some solutions cost millions of dollars while others took years to roll out. No solution seemed to fit.

The Department of Corporations, with a goal of improving customer service and a modest budget, initiated a competitive bid process. "The biggest problem with other solutions was that they were very expensive," said Stewart. "We just couldn't afford it, so we shelved the idea. Then last year, I got a call from a Microsoft representative who talked to me about Microsoft CRM and how it would improve our ability to track calls."

Stewart said her department is small enough to implement a pilot project. And, since she has less than half a dozen employees to handle the call volume, Stewart wanted a powerful yet value-conscious application.

"We met with the local Microsoft partner and they had an off-the-shelf program that would work for us," explained Stewart. "It was under \$100,000 and could be implemented in three

months." This was a positive development as the project cost was within the department's delegation and allowed the department to move forward with the procurement process with minimal control agency review. Stewart noted, "I think this is huge when implementing technology products. You can get something lost in the control agency review and by the time they OK it, your technology is out of date."

No other vendor came close to providing a better value when it came to price and system functionality, so in the summer of 2004, the department began the process of implementing Microsoft CRM technology.

With the solution set up in mere months, the Department of Corporations' staff quickly mastered the familiar and intuitive nature of the Microsoft CRM interface. In addition, the quality of constituent service immediately improved.

"From the call center's perspective, if someone calls in and wants to know the status of their complaint or question, we can look in the database and all the information is there," said Stewart. "Line agents know when and if a matter has been forwarded to another program unit and if there is an open investigation on it."

"Before that, we would send complaints to program staff and we couldn't access any of the units' databases to tell us what was happening with that particular issue. So we had very spotty customer service. Microsoft CRM allows us to go into the database and take a look at where we are in the process."

With a streamlined constituent management solution in place, the Department of Corporations is better able to answer questions and inquire about questionable business practices. In addition, the agency's CIO, Tom Dolce, was pleased that the project was able to consolidate four databases into one. Furthermore, the standards-based architecture of Microsoft CRM allows agencies to create new processes not previously developed.

"The interesting thing about the call center and Microsoft CRM is that it reaches down into the foundation of the department to change business processes," said Stewart. "So while you're implementing technology, you're also able to re-engineer the agency's business process."

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Julie Stewart, manager of consumer services, California Department of Corporations

Big problem, Easy solution

New Orleans untangles city financials with Microsoft Great Plains.

You're not likely to find a more uniquely American city than New Orleans. Steeped in history, the city exudes a culture born of the French, jazz music, Cajun food and Southern hospitality. At the same time, New Orleans has a reputation as an idiosyncratic bureaucracy. Of the two perceptions, the city's technology infrastructure was definitely more akin to the latter.

In 2002, Mayor C. Ray Nagin was the surprise winner of the mayoral race. Nagin had never before held an elected office. Instead, he had a successful business communications background and promised to modernize the mainframe relic that was running the city.

Nagin designated Greg Meffert as New Orleans' chief technology officer. Meffert is also a political outsider and was eager to make dramatic changes in the way the city ran its finances. The solution, Meffert said, was Microsoft Great Plains.

"We had a very old AMS system," explained Meffert, "code that was literally written in the 1970s. The city had very little financial reporting. We didn't even have a balance sheet, so the first order of business was to clean that out. We needed to figure out just how much cash we actually had."

Nagin tasked Meffert with implementing an architecture that would allow the city to see its financial resources in real time. As an added challenge, the new solution had to save the city more money than it would cost to develop. That's where Microsoft Great Plains came in.

"Microsoft Great Plains came about because we are a true reform administration," said Meffert. "The mayor wanted to be able to see where cash was going, how much he had and what was on the horizon instead of relying on multiple layers of bureaucracy to tell him. We had to generate savings while we're putting in new technology. We didn't have the luxury of spending \$10 million and just hoping the solution would work."

The change would be dramatic. Completely renovating the way a city's technology infrastructure

functions is a task few want. So Meffert talked with Microsoft about building a solution that had never existed in the city — a solution that would take financial data from every city agency and tie it together in real time, providing a single view. It was a risk the city decided to take.

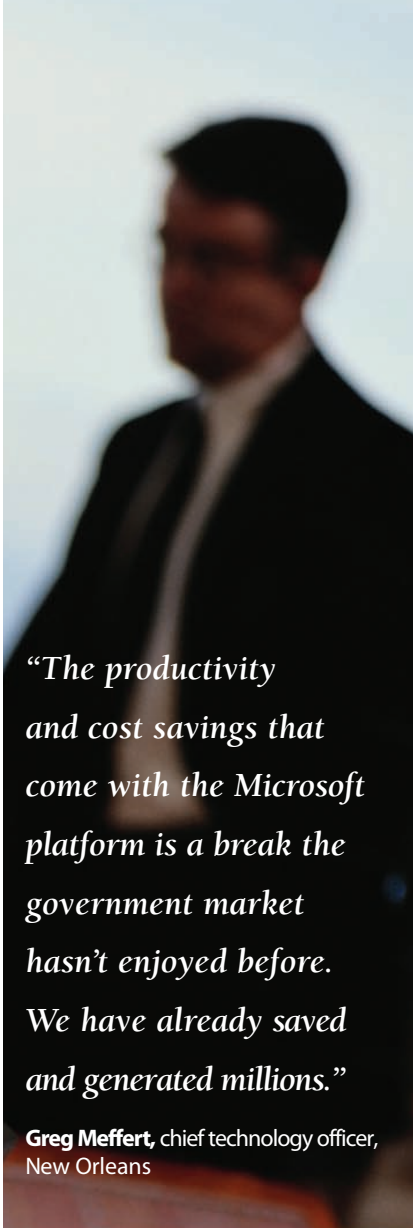
"You need to have guts to go with this type of true solution," said Meffert. "What we're building really doesn't exist anywhere else. In this case, our deal was struck directly with Microsoft. We have their service and expertise. We have their help in licensing. It's like a mini-start-up that's within the City Hall confines."

The Microsoft Great Plains solution is a three-phase project. Phase one eliminated the staff-produced mainframe financial reporting. Phase two is aimed at generating a citywide general ledger and revenue-reporting capability. Phase three will integrate sophisticated tools to allow for real-time reporting, data that no one had ever produced in New Orleans.

"As we've moved ahead, we've seen striking changes in knowing where our dollars are going while eliminating waste and redundancy," Meffert said. "What we're doing enables us to have much tighter control of where we're putting our cash. We are able to see across 37 different agencies now — we weren't able to do that before."

Microsoft Great Plains is allowing the city to create entirely new financial reporting processes that save money, time and resources.

"The productivity and cost savings that come with the Microsoft platform is a break the government market hasn't enjoyed before," Meffert said. "We have already saved millions and generated millions in additional revenue from better money management. Another major benefit is that it decreased our dependence on outside contractors. Microsoft Great Plains allows us to re-engineer our business processes. It allows us to visualize a change and use the technology to execute that change. That is our approach in a nutshell."



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Greg Meffert, chief technology officer,
New Orleans

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