



Telephony Provider Adds New Customers with Combined Communications and CRM Solution

Overview

Country or Region: United States

Industry: Technology and Communications

Partner Profile

Avaya—based in Basking Ridge, New Jersey—designs, builds, deploys, and manages communications networks for a variety of private businesses and government entities.

Business Situation

Based on requests from its smaller customers, Avaya wanted to extend its IP Office telephony platform to include customer relationship management (CRM) functions without a lot of cost and complexity.

Solution

Using the Microsoft® .NET Framework, Avaya developed software that integrates IP Office with Microsoft CRM.

Benefits

- Increased revenues
- Increased partner base
- Reduced development cost/time
- Ease of integration
- Improved customer satisfaction

“Microsoft has opened up a new market of opportunity. We can offer our smaller customers a CRM solution with the same capabilities as those traditionally affordable to large corporations.”

Frank Anderson, Business Development Manager, Avaya

Avaya’s small to medium-sized customers—businesses employing fewer than 300 people—often want to implement customer relationship management (CRM) applications as they upgrade or deploy new communications and contact center solutions. However, in the past, these customers found CRM offerings too costly or complex to implement, which made it difficult for Avaya to fully grow this customer base. By integrating its IP Office telephony platform with Microsoft® CRM (now part of Microsoft Dynamics™), Avaya can meet both the communications network and customer relationship management needs of its smaller customers. As a Microsoft Business Solutions independent software vendor (ISV), Avaya expects its alliance with Microsoft and the integrated offering to open doors as both companies expand their presence in the CRM market.

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Situation

Part of Lucent Technologies until 2000, Avaya designs, builds, deploys, and manages communications networks for a variety of private businesses and government entities around the world.

Product offerings include the Avaya IP Office telephony platform, which the company designed to meet the communications needs of home offices and small to medium-sized businesses with 2 to 360 extensions. Both a voice and data communications system, IP Office uses IP technology, more traditional telephony, or a combination of both. IP Office also includes local area network and wide area network capabilities. It can be deployed across multiple locations and managed from a central point.

Avaya's IP Office includes integrated messaging, voice mail, and auto attendant to help businesses manage calls and messages. The solution also offers remote access so employees can work from home or while traveling. Managed through IP Office Manager, a Microsoft® Windows®-based PC software application, the platform connects to the Avaya IP Office system using the TCP/IP protocol.

In the past, Avaya's customers in the small to medium-sized business (SMB) market often wanted to implement customer relationship management (CRM) applications as they upgraded or deployed new communications and contact center solutions from Avaya. However, according to Frank Anderson, Avaya's Business Development Manager, these customers found the current CRM solutions too complex or too costly to implement.

“Most of the CRM offerings on the market were invented and designed for larger enterprises,” Anderson says. “Customizing

those for small businesses is a costly and lengthy process and often has mixed results.”

According to Anderson, Avaya's own CRM solution was developed for companies with a minimum of 500 employees.

“To develop a CRM solution designed specifically for the SMB market represented a costly, time-consuming prospect for Avaya,” Anderson says. “We decided to look around for a CRM partner who could offer companies a cost-effective solution that's easy to install, use, maintain, and customize.”

Solution

When Microsoft announced its intentions to release a CRM solution designed for integration and extensibility, Avaya decided to develop an integration application that could be implemented quickly by its smaller customers and yet offer the scalability and complexity required by larger organizations. Thus, Avaya integrated its IP Office with Microsoft CRM.

“Microsoft has opened up a new market of opportunity,” Anderson says. “We can offer our smaller customers a CRM solution with the same capabilities as those traditionally affordable to large corporations.”

Microsoft CRM is a scalable front-office solution incorporating many of the technologies that companies already use to manage their businesses:

- Microsoft SQL Server™ 2000 serves as the transactional data store and metadata layer of the Microsoft CRM application. Use of SQL Server, which is part of Microsoft Windows Server System™ integrated server software, provides a scalable and reliable platform for managing vital customer information.

- Microsoft Exchange Server 2003 and Exchange 2000 Server, also part of Windows Server System, receives, sends, and tracks incoming and outgoing e-mail.

- The Active Directory® directory service, included with the Microsoft Windows Server™ 2003 operating system—the foundation of Windows Server System—helps to provide tight security and reduced administration costs. Active Directory improves the management and support of user profiles, roles, and privileges.

Connecting the Two Solutions Automates Customer Information Capture and Access

The solutions communicate with each other using the Microsoft CRM Web service application programming interface (APIs) and the extensibility features offered in the Microsoft CRM application. Using these technologies, Avaya can seamlessly integrate with Microsoft CRM, embedding their user interface and providing the ability to directly navigate users to specific records in the Microsoft CRM application from IP Office.

For example, when a call comes into a company's contact center, IP Office automatically queries the Microsoft CRM SQL Server database management system to find all relevant customer information. The information then appears on a pop-up screen in the call center so the customer service representative can more effectively answer questions and address concerns. Following the call, alerts and notifications can be automatically sent by Microsoft CRM to sales personnel for additional follow-up.

Avaya's integration has been tested and approved under the new Microsoft CRM Test. This software test identifies independent software vendor (ISV) solutions that successfully run on Microsoft CRM and

qualifies ISVs for participation in the Microsoft Partner Program.

Open Architecture Ensures Rapid Development and Ease of Integration

As a Microsoft Business Solutions ISV, Avaya worked closely with developers at Microsoft as it used the Microsoft .NET Framework to modify IP Office and develop the middleware that integrates IP Office with Microsoft CRM. The .NET Framework is an integral Windows® component that supports building and running the next generation of applications and Web services. According to Peter Kratzel, Avaya's Product Development Manager, it took Avaya only six weeks to develop the IP Office and Microsoft CRM connection—from concept to market.

As a result of the close cooperation between the two companies, Avaya's telephony and call center reporting and management applications within IP Office integrate seamlessly with Microsoft CRM. This tight integration gives users an easy, fast, and affordable means of adding telephony capabilities to their CRM installation.

"The customer doesn't even see the large footprint underneath their desktops," Kratzel says. "To them, IP Office looks and operates as just another Microsoft CRM module. They don't know there's another piece of software attached."

According to Kratzel, Avaya used nearly every technology provided by the .NET Framework, including ASP.NET, ADO.NET, Web services using SOAP and XML, and Message Queuing. The software development kit (SDK) that ships with Microsoft CRM also was used to develop the connection between the two solutions.

The APIs provided with Microsoft CRM also helped with Avaya's speed to market and will assist with rapid and cost-effective upgrades

throughout the combined solution's life cycle. According to Kratzel, the APIs are based on a metadata-driven data storage model and include a declarative workflow engine, an integrated setup process, and configuration and management tools that greatly reduce the cost and time associated with configuration, customization, deployment, and upgrade.

Benefits

By integrating IP Office and Microsoft CRM, Avaya and its 2,000 global partners can offer their SMB customers a telephony system and customer service solution that significantly lowers points of entry into that targeted market.

Revenue Growth

To date, Avaya estimates that it is involved with 4 percent of the Microsoft CRM installations already up and running. According to Anderson, this will have a tremendous impact on Avaya's ability to increase revenues and grow its customer base within the SMB market.

"Microsoft's goal for CRM licenses over the next three to five years is staggering," Anderson says. "Capturing even a small percentage of those future CRM installations represents incredible revenue growth for us."

Building a Community of Partners

Beyond the revenue growth, the opportunity to jointly market and install IP Office and Microsoft CRM is building a strong community of partners. To date, Avaya has recruited more than a dozen Microsoft Business Solutions ISVs into Avaya's partnership program.

However, according to Anderson, the real success has been the opportunity to work more closely with those companies that distribute and service Avaya's products but

haven't invested the time or money to become official partners.

"By matching those companies with Microsoft CRM partners to work together on customer implementations, Avaya increases its SMB market presence and helps develop relationships between a variety of product and service providers," Anderson says.

A recent project provides a good example of how these partnerships work. The integrated Avaya IP Office and Microsoft CRM solution was sold to the customer by Hutton Business Solutions, an authorized reseller for both Avaya and Microsoft. Network design and testing were provided by Voda One, a division of Westcon Group. The Westcon Group is a distributor and global channel provider of Avaya networking technology products.

In the future, Anderson expects hardware vendors like HP to join the mix as well. "The future is yet to be written, but I can see a group of partners working together to market and deploy Microsoft CRM, IP Office, and HP servers as one complete solution," he says. "There's a community of partners out there who are confident that they are going to work well together and that they have a lot to gain from entering the SMB market."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

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