



**CUSTOMER:**  
Delta Utility Services



**INDUSTRY:**  
Infrastructure Services & Testing



**LOCATION:**  
Dunedin, New Zealand



**PRODUCT:**  
Microsoft Dynamics CRM

“We were expecting a custom built, and potentially more expensive approach. Instead, Enabling provided a customised version of a CRM package. This not only solved the problem at relatively low cost, but it also provided useful additional functionality.”

MARTYN JONES – DELTA DATABASE ADMINISTRATOR

**THE SCENARIO**

Delta is a South Island-based infrastructure, construction and asset management company. For the past 10 years it has provided a range of services to local authorities, property developers, industrial customers, energy companies and electricity line companies. It provides a wide range of services, which includes testing insulated apparel for high voltage electrical workers.

To meet safety requirements and regulations, the thick rubber gloves and boots that shield workers from strong electric currents need to be certified. Delta maintains a testing facility, which it calls the “Rubber Room,” to perform a range of tests on these items using electrical currents of about 40,000 volts. Testing is performed both for its own field operators who use this equipment, as well as for a range of external customers who rely upon these results to keep their employees safe.

Test results were being managed with a spreadsheet system. When that proved impossible to maintain, the company needed a complete remake of the system. It needed to be easy to use, updatable, and affordable.

**THE REQUIREMENT**

Testing requires careful record keeping and analysis, and this was being performed using a complex spreadsheet system. When the person who developed the spreadsheet left the company, Delta was left with an important application that nobody understood, and which could not be updated. It also lacked important functionality and there was no way that it could be upgraded.

To solve its problem, Delta contacted Enabling. Delta requested a complete remake of the application, based on analysis of their business processes. The spreadsheet system was not even to be used as a model. The Enabling team considered the requirements and processes, and came back with a solution based around Microsoft Dynamics CRM.

**THE SOLUTION**

The solution put in place by Enabling was developed on the flexible Microsoft Dynamics CRM platform, a business management solution that is easy to use and customisable. It is targeted at small and mid-sized organisations and provides a familiar user experience that resembles the Microsoft Office Suite. It provides a great deal of flexibility, and users can select only those functions that they need.

**ABOUT DELTA**

Delta is an asset management and infrastructure contracting company, providing strategically oriented services focused on optimising the long-term performance of utilities and similar companies. It has many years’ experience managing and constructing electricity, roading, water, waste and environmental utility assets. It specialises in providing effective maintenance, renewal and construction services.

With more than 500 skilled staff and an annual revenue of NZ\$70 million, Delta provides management services for large projects as well as ongoing maintenance and management of equipment and facilities. The company has built its business by focusing on creating and maintaining long-term relationships with its clients.

**ABOUT ENABLING**

Enabling is the recognised leader in the provision and support of business management applications throughout Australia and New Zealand, especially in the areas of technical and development expertise, solution design and long-term customer service. With offices in Melbourne, Sydney, Brisbane, Auckland, Wellington, Christchurch and Dunedin, we have both strength in numbers and depth of expertise to support organisations of all sizes with a multitude of requirements.

## ABOUT MICROSOFT AND DYNAMICS CRM

Founded in 1975, Microsoft (Nasdaq "MSFT") is the worldwide leader in software, services and solutions that help people and businesses realise their full potential. Microsoft Dynamics helps you automate and streamline financial, customer relationship and supply chain processes.

Comprising several unique software products, Microsoft Dynamics works with (and like) Microsoft software you may already be familiar with – easing adoption and reducing the risks inherent with implementing a new solution.

Microsoft Dynamics CRM is a Customer Relationship Management software package. Out of the box, the product focuses mainly on Sales, Marketing, and Customer Service solutions. Microsoft Dynamics CRM uses familiar, intelligent and flexible features, which are easy to use and engineered to fit your business.

Organisations also need to manage other relationships that are integral to success – employees, partners, suppliers, distributors, vendors and many other critical stakeholders. Microsoft Dynamics CRM can easily be customised for these "Extended CRM" scenarios and enhance the value of all relationships, improve business relevance and fit, drive operational excellence and increase business insights.

Ease of customisation is a key feature of Microsoft Dynamics CRM. This made it ideal as a basis for Delta's Rubber Room solution. Not only did it contain most of the necessary options out of the box, but it was easy to use, understandable, and readily modifiable to meet Delta's unique requirements. It fully integrates with Microsoft's Office Suite, and provides a similar user interface, making training requirements minimal. With most of the functionality already built in, development costs and deployment time were also greatly reduced.

"Using a CRM package for this type of application is a novel approach," says Delta Database Administrator, Martyn Jones. "But the solution has worked well, and makes a great deal of sense. It also adds capability to manage our Rubber Room clients, providing email reminders when testing is due, for example. This has been a great help in making the business easier to run, and has helped us to reduce the amount of paper records that we were maintaining to support certifications."

For Enabling, this type of application also represents a new avenue to pursue. It could be called an "outside the box" idea based on an "inside the box" product. The approach made implementation easy, reduced training requirements, and ensured there is an update path and plenty of support if Delta wishes to extend the application.

### THE RESULTS

The implementation, completed in February 2010, has had significant results. A spreadsheet system that could no longer be sustained has been replaced by standard software that can be easily modified and integrated with other systems and provides numerous additional advantages. It is powerful enough to ensure that the task is being adequately performed, but simple enough to permit easy modification by Delta staff, such as addition of new reports, format tweaking, and the like. Operation is transparent, and it can be easily updated to meet future requirements.

"One of the positive changes was that we were able to eliminate a lot of paper records," says Jones. "We had folders and folders of paper certificates and related material before, making it difficult to locate individual items. Now we can just put a number in the system, and up comes the certificate with its history. We can locate related information, obtain an electronic copy of the certificate, and email the results to our customers."

The implementation solved the initial problem, added functionality, and has also raised an interest in extending the product's capabilities for the future.

### THE FUTURE

"We're looking at the possibility of using a CRM system companywide for traditional CRM purposes," says Jones. "Use of Microsoft Dynamics CRM in this instance has resulted in a review of the system. We can potentially use this functionality in a more traditional manner. Customer contact details are currently all over the place and consolidating them in a CRM system could save a lot of time."

For the Rubber Room application, the customisation capability and use of standard software means that new reports can be generated with relative ease by Delta's in-house staff. There is also potential for integration with other systems. One thought for the next revision, for example, is to provide direct input of financial data from the testing system into the company's financial systems.

Another future possibility is to make testing details available to customers online. For the moment, though, Delta is happy with having a system that is efficient, reliable, and can be easily modified.

"Our relationship with Enabling has been good. They know what they're doing, and were able to come up with a really good solution."

MARTYN JONES – DELTA DATABASE ADMINISTRATOR

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