



**CUSTOMER:**  
Tracey Brunstrom & Hammond (TBH)



**INDUSTRY:**  
Professional Services



**LOCATION:**  
Sydney, Australia



**PRODUCT:**  
Microsoft Dynamics® CRM, IPM

“IPM’s ability to automatically file emails against projects ensures our staff use accurate, compliant information. We believe that the inbuilt checks and balances will significantly reduce commercial risk over time.”

ANDREW NEWLING, SENIOR CONSULTANT, TRACEY BRUNSTROM & HAMMOND

**THE SCENARIO**

Delivering a project efficiently – on time and within budget – is no easy task, especially when it involves large-scale construction or engineering. Successful outcomes require careful initial planning, and complex relationships between owners, end users, designers, authorities, suppliers and contractors require continuous management.

Central to high calibre project management is the way the project management system handles documentation and correspondence. Independent project management specialist Tracey Brunstrom & Hammond (TBH) was looking at how they could improve these processes. Staff traditionally used Microsoft® Excel spreadsheets to track and budget projects. These spreadsheets were stored locally, which made it hard to establish quality control and consistency right across the company, and difficult to review projects without visiting the local office. TBH wanted a central repository for documents created on templates to ensure consistency, best practice and compliance with state and national legislation.

Top of its agenda was a method for automating the management, tracking and archiving of the thousands of emails they receive every day, and establishing an audit trail of correspondence relating to each specific project.

**THE REQUIREMENT**

With so many projects on the boil, TBH sought greater efficiency in the way they tracked documentation and correspondence across these hundreds of projects. They also wanted consistency in the way they delivered and managed documentation, while also creating the ability for directors to conduct comprehensive project reviews without having to go on-site. As they grew, they could clearly see that manual data management was stunting productivity and making it harder to meet their compliance obligations.

Andrew Newling, Senior Consultant at TBH Brisbane investigated a range of technical options, including two applications that had been built specifically for project management in the construction industry. Andrew also approached Enabling Queensland.

**THE SOLUTION**

Enabling Queensland introduced TBH to project management application IPM. Built on Microsoft’s flexible business software, Microsoft Dynamics® CRM, this adapts Microsoft Dynamics® CRM’s standard functionality to specific project-related elements and processes, creating a comprehensive project management tool, providing it all in an out-of-the-box product.

**ABOUT TRACEY BRUNSTROM & HAMMOND (TBH)**

Tracey Brunstrom & Hammond (TBH) is one of Australia’s most experienced providers of independent project management services, having completed more than 7,000 projects and 1,000 expert reports. From project programming, scheduling and management to dispute resolution and strategic planning, TBH’s expertise has benefitted projects – both large and small – across the spectrum of industry since 1965. Headquartered in Sydney, and with approximately 200 employees, the company also has offices in Brisbane, Perth, Adelaide, Melbourne and Singapore.

**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 and 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 realize 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 allows you to manage projects more efficiently with the ability to track, monitor, and retrieve highly detailed information about each project, activity, and task. With a comprehensive 360-degree view of your customers and streamlined processes, it's easier to complete projects on time and within budget.

### IPM

IPM Global is a project management software company that specialises in developing business software for project-related industries, in particular construction engineering. IPM Global uses the Microsoft Dynamics® CRM xRM application development framework which accelerates the development and delivery of relationship-oriented business applications – in this case project management, documentation, communications and processes. Its IPM product is a fully integrated project management tool that integrates seamlessly with other Microsoft applications and back office ERP solutions.

### SOFTWARE CHOICE

- Microsoft Dynamics® CRM
- IPM

### AUSTRALIA

1800 362 254  
1800 enabling

### NEW ZEALAND

0800 362 254  
0800 enabling

Called 'Its Project Management' (IPM), its Microsoft Dynamics® CRM core meant it could readily integrate with TBH's existing Microsoft Office applications. Andrew asked Enabling to demonstrate IPM and was immediately impressed.

"It soon became clear the IPM product with Microsoft Dynamics® CRM could tick all the boxes, and would enable us to achieve our business goals," says Andrew. "Microsoft is a trusted brand, and the fact that Microsoft Dynamics® CRM works with Microsoft Office Outlook was a big bonus because it would make the system far easier to use."

The demonstration quickly progressed to an engagement, with IPM Global helping Enabling to adapt the solution for trial. "We provided samples of our document templates and discussed ideal workflows together," says Andrew. "A few weeks later Enabling came back with a plan for the implementation phase that suited TBH's business requirements." After trialling the Microsoft Dynamics® CRM-based solution, Andrew Newling saw in an instant how it would transform the way TBH did business.

"The capabilities are impressive; I have no doubt that this will make us more efficient," he said.

### THE RESULTS

As a result, project delivery is already more efficient. Clients know what to look out for when they receive a document and contractual wording is reliable, making for better service and compliance. Project risk is also reduced, partly because directors can review every element of a project's progress from their head office. Slippages are now easier to uncover and client expectations easier to manage.

Documentation is standardised with the help of specially designed templates, while integration with Microsoft Exchange Server means emails can be tagged to projects and correspondence easily tracked. Standard workflow procedures are automated, with alerts sent to staff whenever specific issues or documents require action.

The product assigns a unique ID code to each project, and when correspondence is created it is automatically filed against the respective project, creating an easily accessible email chain. This means staff at TBH can swiftly track variations to projects, critical notifications and site instructions.

In addition, because project management workflows are automated, TBH can more easily honour its commitment to timely responses.

"Some documents have to be reviewed by directors before proceeding to the next stage, so we have automated this process, with reminders and alerts to ensure that we are always compliant," says Andrew

### THE BENEFITS

#### Consistent Approach to Project Delivery

With everyone in the organisation using the same templates, the company will be able to guarantee that contractual wording is accurate and precise, and that TBH provides a consistent, high-quality approach to project delivery.

Moreover, as documents are always presented in this consistent format, clients can recognise them and know what to look for or fill out, an added benefit that makes client interaction easier.


#### Time-Saving Efficiencies

Staff will save time as they no longer have to locate or recreate project management forms or templates. As soon as project information is entered or altered, the project management tool uploads the update onto other relevant templates.

"We anticipate saving a significant number of man hours over time and this alone should give us a rapid return on investment," says Andrew. "We'll also reduce human errors and time wasted on multiple data entry across Microsoft Word and Excel documents."

#### Reduced Commercial Risk

The IPM application gives TBH an email audit trail so they can track all correspondence by job. This aids transparency and helps staff to quickly navigate decision-making history and retrieve critical information, such as project finance, agreed dates and contracts.



Moreover, now that they have one centralised project management solution, managers can quickly see and report on job slippage so they can adjust expectations and processes to match the anticipated timeframe. This will make management reporting far simpler.

The new solution also puts important checks and balances in place to ensure quality control is maintained at all times. For example, some tasks automatically place a 'hold' on a form or document until a director has reviewed it.

Andrew sees these features as some of the key benefits of the Microsoft Dynamics® CRM-based project management tool.

"IPM's ability to automatically file emails against projects ensures our staff use accurate, compliant information," he says. "It is our belief that the inbuilt checks and balances will significantly reduce commercial risk over time."

#### Improve Productivity

Another objective for TBH was to improve staff productivity. For instance, previous documentation processes were detailed and laborious, meaning that TBH managers could not delegate much of their work. However, the new system has automated and standardised many of the templates and workflows.

"The new system enables staff to work more collaboratively, supporting our company's business model, which provides a senior person to oversee the work of every junior team," says Andrew.

#### On-Demand Project Review

With offices located across Australia and in Singapore storing their own information, senior managers had previously found it difficult to get hold of documentation when trying to conduct project reviews remotely.

"Now with a single database stored on one central server, authorised staff members can view a project's status whenever they wish, simply by logging in," adds Andrew.

#### Improved Remote Access

IPM can be deployed out of the box through Microsoft Office Outlook and with Web browser access. TBH plans to use this capability to provide staff with more flexibility in how they work.

"By providing staff with online access from a Web browser, they will be able to work on projects, update information and remain completely informed when out in the field or at home," says Andrew.

#### Improved Growth Capabilities

The new solution also gives TBH the flexibility they need to work in today's changing business environment.

"If we open a new office, grow or scale, we simply add more users to the system," comments Andrew.

"It's also easy to add new capabilities or new templates. For example, if new legislation is introduced we can make sure it is consistently incorporated nationally or at state level. The system is fully customisable, which allows us to continue evolving our solution to match our changing needs."

"It soon became clear that the IPM product built on Microsoft Dynamics® CRM could tick all the boxes and would enable us to achieve our business goals. Microsoft is a trusted brand, and the fact that Microsoft Dynamics® CRM works with Microsoft Office Outlook was a big bonus because it would make the system far easier to use."

ANDREW NEWLING, SENIOR CONSULTANT, TRACEY BRUNSTROM & HAMMOND