



## Microsoft Dynamics Customer Solution Case Study



**Ivanhoe  
Cambridge**

Caisse de dépôt et placement  
du Québec

### Overview

**Country:** Canada

**Industry:** Real Estate

#### Customer Profile

Ivanhoe Cambridge is one of the largest owners and managers of shopping centres in Canada. The company owns more than 50 properties across the country and provides dynamic destinations for its retailers.

#### Business Situation

Ivanhoe Cambridge needed to replace its inefficient CRM system with a new, user-friendly platform that provided seamless data integration for sales staff across its Canada-wide office network.

#### Solution

Ivanhoe Cambridge hired Microsoft Gold Certified Partner Brodie Computes Inc. to design a custom CRM solution using Microsoft Dynamics CRM, integrated with Outlook 2003 and Microsoft Office 2003.

#### Benefits

- Consolidated database
- Refined sales process
- Customized user interface
- Increased user adoption
- Robust scalability

## Ivanhoe Cambridge refines sales process and integrates data with Microsoft Dynamics™ CRM

“What we're achieving through Microsoft Dynamics CRM is a seamless integration across the company. It's less about saving time and money and more about giving our people the right tools to do their jobs well.”

*Paul Harris, Senior Vice President, National Leasing, Ivanhoe Cambridge*

Ivanhoe Cambridge is a pre-eminent Canadian-based global property owner, manager, developer and investor, focusing on high-quality shopping centres located in urban areas. Beyond its strong Canada-wide presence, the Company is also active in the United States, Brazil and Europe, where it owns a number of properties either by itself or through joint ventures with prominent real estate partners. Abroad, Ivanhoe Cambridge also holds interest in several shopping centre development and management companies and maintains offices in Europe and Asia. Its real estate portfolio consists of almost 46 million square feet of retail space and includes some 70 regional and super-regional shopping centres. As at December 31, 2006, the market value of Ivanhoe Cambridge's assets reached CAD \$12.2 billion.

Ivanhoe Cambridge was looking for a new solution to replace its existing CRM infrastructure which was too complex and lacked the capabilities needed to integrate the company's national sales database and support French language users. In 2004, Ivanhoe Cambridge enlisted Microsoft® Gold Certified Partner Brodie Computes Inc. to design a custom CRM solution based on Microsoft Dynamics™ CRM. The Microsoft Dynamics CRM solution provided a consolidated database that enabled Ivanhoe Cambridge to refine its sales process and develop a customized interface to drive user adoption.



## Situation

Ivanhoe Cambridge is one of Canada's foremost retail managers, specializing in shopping centres. The company owns and manages more than 50 properties in major cities across Canada and co-owns properties throughout the United States, Brazil and Europe. Ivanhoe Cambridge is headquartered in Montréal and has Canadian regional offices in Toronto and Calgary, supported by smaller leasing offices in Edmonton and Vancouver. The company also employs a large sales staff that is responsible for maintaining a sophisticated database of sales contacts, brokers and consultants in order to ensure the company's properties are occupied by retailers and not left vacant.

"The leasing environment we work in is very complex. Our sales staff keeps track of retail contacts, leasing consultants and real estate brokers from several firms," says Paul Harrs, Senior Vice President, National Leasing, Ivanhoe Cambridge. "They track everything from phone numbers to the square footage requirements of a retailer and the cost per square foot and as a result, it's vital that we have accurate and up-to-date information at our fingertips."

In 2004, Ivanhoe Cambridge conducted its CRM activities with staff that was spread out across several servers located throughout Ivanhoe's national network of offices, segmenting the database system. As a result, users were not effectively sharing data across the company.

"We had one leasing agent based in Calgary who was a heavy CRM user, but because of our segmented databases, he wasn't easily able to share information with the rest of our network. The system was so frustrating to use that he resorted to saving the data on his desktop which wasn't benefiting any of the other sales staff," says Harrs.

The previous CRM system also lacked an intuitive user interface, making it difficult to use. Combined with the fact that Ivanhoe Cambridge is a bilingual company requiring French language support – a feature not available in the previous system "The previous CRM system simply didn't have the bilingual support we required, so we knew that we had to find something new." says Julian Shek, manager, Property Management Applications, Ivanhoe Cambridge.

The company needed a solution that would provide a CRM and sales networking tool to bring all of the sales staff across Canada together and centralize them onto one database.

Ivanhoe Cambridge has a complex technical environment with load balancing, clustered Microsoft® SQL Server and clustered Microsoft® Exchange Server. Additionally, Ivanhoe Cambridge runs Microsoft Dynamics CRM as a thin client through Citrix. Microsoft Dynamics CRM was first deployed and tested in a non-production environment and redeployed to production. This process was repeated when Ivanhoe Cambridge upgraded to Microsoft Dynamics CRM 3.0 in June 2006.

## Solution

In 2004, Ivanhoe turned to Brodie Computes Inc., a Microsoft® Gold Certified Partner based in Guelph, Ontario, to help them find a new CRM solution.

"When they made the decision to migrate away from its previous CRM solution, Ivanhoe Cambridge retained our services because we understood their business and existing CRM system," said Karen Brodie, President, Brodie Computes Inc. "We helped them evaluate and identify exactly what they needed in a CRM solution."

Ivanhoe Cambridge reviewed CRM solutions from both J.D. Edwards (Oracle) and Microsoft.

“At the time, Microsoft Dynamics CRM was still in Beta for version 1.0,” says Brodie. “Ivanhoe Cambridge saw demonstrations from both J.D. Edwards and Microsoft. After viewing the Microsoft solution, they were so impressed with the offering that they shelved the idea of even evaluating J.D. Edwards.”

Having built their business on the Microsoft stack, Ivanhoe Cambridge worked with Brodie Computes to roll out Microsoft Dynamics CRM 1.2. In June 2006, a year and a half after the original deployment, Ivanhoe upgraded the platform to Microsoft Dynamics CRM 3.0 integrated with Microsoft Outlook® 2003 email and Microsoft® Office 2003.

“We deployed the Microsoft Dynamics CRM solution in two phases. The first was bringing out the solution in a thin client. The solution was present on our server, but it was not integrated with Outlook” says Harrs. “When we were able to connect Microsoft Dynamics CRM with Outlook, we started noticing a higher degree of usage almost immediately. This was the rebirth of our CRM.”

To complement the Microsoft Dynamics CRM environment, Brodie Computes developed a new, simplified data entry template with customized fields. The template was based on the familiar Microsoft® Office, which provided a user friendly interface to encourage user adoption.

### **Benefits**

Almost a year after the deployment of Microsoft Dynamics CRM, Ivanhoe Cambridge is realizing a range of benefits that are aligned with its original upgrade goals.

#### ***Consolidated Database***

One of the primary benefits of Ivanhoe Cambridge's new Microsoft Dynamics CRM

system is the single, consolidated database across the entire network of offices. Sales staff can access information updated in real-time from any office on the network which gives Ivanhoe Cambridge an up-to-date and accurate picture of its operations regardless of geographic location.

As users adopted the new system, the company realized an increase in the sharing of data between staff which resulted in a consistent information pool across its network. This provides transparency throughout the organization allowing for decisions based on real numbers and data to be made faster and more precisely. Ivanhoe Cambridge can now use this data to keep its entire national team updated regardless of the location of individual members, so that the company's vacancy rates are kept to a minimum.

“The idea behind our CRM deployment is that we need to speak with one voice,” says Harrs. “Providing all of our staff across Canada with a unified and current database lets us know what's going on across the country and provides sales staff with the information they need to handle situations in their area.”

#### ***Refined Sales Process***

Microsoft Dynamics CRM was fully integrated with Microsoft Outlook 2003 and Microsoft Office 2003, giving sales staff information at their fingertips. The single interface houses all the applications used by the sales team, eliminating the need to juggle several applications and making the sales process less stressful and more user friendly. The streamlined process allows the sales staff at Ivanhoe Cambridge to work more efficiently and be more productive overall.

“The nice thing about the Microsoft Dynamics CRM environment is the integration with Microsoft Outlook and other applications in the Microsoft Office suite,” says Harrs.

“Microsoft Dynamics CRM allows us to smooth out the entire sales process from bringing in leads and following up with customers, to tracking e-mail discussions and activities. Our entire sales cycle is contained within one environment.”

#### ***Customized User Interface***

Microsoft Dynamics CRM provides Ivanhoe Cambridge with the ability to tailor its user interface to the needs of its sales staff and enables the company to design a simplified, more efficient method of CRM data entry and tracking. These features ensure Ivanhoe Cambridge is able to migrate its entire sales staff to its CRM system regardless of technical skill level. The company has effectively moved away from the segmented user base it was struggling with previously. The new interface caters to all members of the Ivanhoe Cambridge team and can be used by technically savvy employees, as well as those with a basic knowledge of CRM systems.

#### ***Increased User Adoption***

Since deploying Microsoft Dynamics CRM, Ivanhoe has seen an increase in the number of users adopting its CRM system. Because Microsoft Dynamics CRM is based on the familiar Microsoft Office 2003 environment, employees have found it easier to transition to the new system.

“The major stumbling block we were experiencing with our previous system was actually getting people to use the system regularly,” says Harris. “Microsoft Dynamics provides us with the same look and feel as Microsoft Office, so it’s an environment that the majority of our staff is used to.”

According to Harris: “We experienced a much shorter transition period in terms of knowledge and training. People live in their Microsoft Outlook all day and putting CRM

directly into that environment makes it a part of their everyday life.”

Ivanhoe Cambridge has also deployed Microsoft Dynamics CRM on 35 Blackberry devices via the TenDigits Microsoft Dynamics CRM add-on product Mobile Access. The solution on the Blackberry provides CRM database information at the fingertips of leasing representatives anytime, anywhere.

#### ***Robust Scalability***

Ivanhoe Cambridge has approximately 60 users on board with the Microsoft Dynamics CRM system and plans to add another 30 by the end of 2007. The requirements of this new group differ from the leasing team, but additional entities can be easily tailored to meet their requirements and help grow the Ivanhoe Cambridge CRM user base over the long term.

As an early adopter of Microsoft Dynamics CRM version 1.2, Ivanhoe Cambridge provided invaluable feedback on the final product. The next version of Microsoft Dynamics CRM, due for release late in 2007, will provide Ivanhoe Cambridge with the multilingual capability that is key to its ongoing CRM success. For this reason, it is anticipated that Ivanhoe Cambridge will once again be an early technology adopter.

“We rolled out Microsoft Dynamics CRM when it was in version 1.2 and, as a general practice, we usually never adopt a solution at such an early stage of development,” says Shek. “We made an exception with Microsoft, however, simply because we knew that down the road, as the company grew and our requirements changed, we would be better off using the Microsoft product.”

“For Ivanhoe Cambridge, Microsoft Dynamics CRM is about improving the way we do our jobs,” says Harris. “The system is definitely more efficient, but this is not something that

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For more information about Brodie Computes Inc. products and services, call 1-888-80-MS-CRM or visit the Web site at: <http://www.brodie.com>

For more information about Ivanhoe Cambridge products and services, call (514) 841-7600 or visit the Web site at: <http://www.ivanhoecambridge.com>

we can assign a dollar value to. What we're achieving through Microsoft Dynamics CRM is a seamless integration across the company. It's less about saving time and money and more about giving our people the right tools to do their jobs well."

## 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.

For more information about Microsoft Dynamics, go to: [www.microsoft.ca/dynamics](http://www.microsoft.ca/dynamics)

### Software & Services

- Microsoft Dynamics CRM 1.2
- Microsoft Dynamics CRM 3.0
- Outlook 2003
- Office 2003
- SQL Server 2000
- Exchange Server 2003

### Partners

- Brodie Computes Inc.

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