



Microsoft Dynamics Customer Solution Case Study



Real Estate Management Firm Links Global Operations with Customer-Focused Solution

Overview

Country or Region: United States

Industry: Real estate management

Customer Profile

Jones Lang LaSalle is a leading real estate services and money management firm, committed to delivering strategic, fully integrated services for property owners, investors, and occupiers.

Business Situation

With 15 disconnected customer relationship management systems, JLL could not efficiently share customer information across organizational and geographical boundaries.

Solution

JLL chose Microsoft Dynamics™ CRM for its seamless integration with Microsoft® Office Outlook®, which allows secure data sharing at a global level, providing more opportunities to clients.

Benefits

- Accelerates time-to-benefit
- Fits securely with existing systems
- Improves client service
- Increases sales

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David Johnson, Chief Information Officer, Jones Lang LaSalle

Jones Lang LaSalle (JLL) is one of the world’s largest and most diverse real estate services and money management firms. With more than 22,000 employees in 160 offices worldwide, JLL required a scalable, secure, enterprise-wide customer relationship management (CRM) system to efficiently share customer information across geographical and organizational boundaries. After an extensive review, the firm chose Microsoft Dynamics™ CRM to replace its regional CRM systems, including Salesforce.com and Siebel. The new solution ties global operations together and offers employees a user-friendly interface. With the first phase of implementation complete, JLL gains the ability to accurately track client needs and identify greater cross-selling opportunities, which has led to improved client service and increased sales.



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Situation

Headquartered in Chicago, Illinois, Jones Lang LaSalle (JLL) is a money management firm that provides comprehensive real estate and investment management expertise on a local, regional, and global level. With a reported annual revenue of U.S.\$2 billion in 2006, JLL's business thrives in a favorable real estate market where investors and corporations increasingly seek the company's services.

In 2005, JLL's customer relationship management (CRM) structure for its global sales force included 15 unconnected CRM systems, with requests pending for nine more systems. The systems did nothing to bridge the gaps that spread across the organization, and only served employees on a local level, according to their line of business.

With rapid growth throughout its locations in Europe, Asia, and the Americas, and with future offices anticipated in the Middle East and Africa, JLL faced the challenge of sharing client data between all of these disparate locations. Multiple business divisions within the company—notably its markets and corporate solutions group—also had difficulty tracking client needs and identifying cross-selling opportunities.

“While we were tracking client needs and services at a local level, we were not sharing that information at a global level,” explains David Johnson, Chief Information Officer for Jones Lang LaSalle. “We might have had an opportunity for a client in a different part of the world, but were unable to pass it on because the only people that would know were in the local office.”

Pressure began to build—the company needed a globally integrated CRM system for all 125 offices. Johnson realized JLL could benefit from a single, centrally managed system that could be customized at a

regional or local level to capture more clients and opportunities. “Connecting clients and opportunities across our business was difficult without a single system in place through which to share information. Without that system, we were relying on chance to identify new opportunities,” says Johnson.

Hundreds of JLL offices all over the globe were storing critical client information, making data security a major requirement for the new solution. “We decided early on that one of the baseline requirements for our global CRM system would be that it had to remain behind the firewall, with data stored on servers we own,” says Johnson. “We couldn't risk exposing our client information under any circumstance.”

To ensure success, the new CRM system had to garner acceptance and enthusiasm from employees while presenting as few barriers to adoption as possible. “The transition is a big cultural shift for our firm. Real estate people are deal people; they're not necessarily note takers,” admits Johnson.

JLL sought a single, fully integrated CRM system that could offer ease of use for employees and enable secure protection of customer files—all at a cost-effective price. After approval from the board of directors, the new CRM system would be one of only a few global applications, becoming the second-largest global implementation in the company's history and a catalyst for future success.

Solution

JLL considered a variety of CRM packages, including Salesforce.com—which the North America region used—Siebel, Oracle, and JD Edwards. However, the company was most attracted to Microsoft Dynamics™ CRM for its familiar interface and ability to integrate with other Microsoft® technologies.

“We found the other systems to be far too complex and bulky,” says Johnson. “They would not have been used by people out in the field.”

Microsoft Dynamics CRM delivers a fast, flexible, and affordable solution that drives consistent, measurable improvements in every business process, enabling closer relationships with customers and helping to achieve new levels of profitability. For JLL, the tools and capabilities in Microsoft Dynamics CRM helped to create and easily maintain a clear picture of customers, from first contact to purchase and postsales.

Perhaps most importantly, Microsoft Dynamics CRM works with and like the other Microsoft software that JLL employees use every day. All client information is managed from Microsoft Office Outlook®, the messaging and collaboration client, including sales data, lead information, and marketing pitches—everything employees need to stay connected with customers. “Our system isn’t going to be successful unless people use it,” explains Johnson. “Microsoft Dynamics CRM integrates seamlessly with Microsoft Office Outlook, and people inherently understand it right away.”

As an additional convenience, Microsoft Dynamics CRM runs on the familiar Microsoft platform. “All of our desktops and networks are built on Microsoft platforms and technologies, and all of our development is accomplished with the Microsoft .NET Framework,” adds Johnson. “That uniformity makes it easy to scale as our business grows.”

Deployment

During the initial phase of the implementation, JLL chose to work with Microsoft Gold Certified Partner Project Hosts to pilot a hosted version of Microsoft Dynamics CRM. Using the hosted solution for

demonstrations and initial customizations, JLL assembled a user group to provide feedback on functionality that would help prepare for the eventual on-site deployment. JLL was able to learn which features the sales force would actually want and use, and put together a robust set of requirements that met all user needs for the global deployment.

While JLL plans to implement Microsoft Dynamics CRM across the organization, it divided the process into two deployment phases. The company has already begun the first phase and deployed the solution to 900 account managers, primarily in the Americas—the offices in Asia and Europe are currently using pilot programs. JLL hopes to achieve full deployment by the end of 2008.

During the second phase of deployment, JLL will deliver business intelligence reports from Microsoft Dynamics CRM to intranet sites based on Microsoft Office SharePoint® Server. The company also plans to upgrade to the newest release of Microsoft Dynamics CRM, code named “Titan,” which will support JLL’s multilingual environment. When deployment is complete, the system will extend to approximately 3,000 end users.

Customizations

Microsoft Gold Certified Partner Avanade also worked with JLL to assist with configuration and customization efforts. Explains Riaan Vandermerwe, Global Architect at Jones Lang LaSalle, “We structured our system around our Global Enterprise Model—the core system that all employees around the world have access to. Then, we layered our local and regional requirements on top of that.”

JLL and Avanade tailored Microsoft Dynamics CRM to meet specific needs involving:

- **Cross-Selling:** An additional integration feature allows JLL to track multiple business divisions that help deliver

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Jack Minter, Managing Director, Jones Lang LaSalle

opportunities to clients across business lines.

- **Client Profiles:** JLL configured the system to show profiles based on client needs to promote more comprehensive searches and opportunities.
- **Security:** To ensure the security of client data, access to profile information is limited to user roles.

Training Process

Because of the implementation’s large scope and size, JLL is committed to an ongoing training process that helps employees learn Microsoft Dynamics CRM. The company first offered training to project managers from each international region. From there, the managers, along with Avanade, trained a set of “power-user” employees at the regional level who were nominated by each business division. The integrated team then delivered training to all end users.

“It’s important to pick the right business-level support people,” says Vandermerwe. “Power users need to have extensive knowledge of everyone’s business approach to understand the way they will use Microsoft Dynamics CRM.”

Benefits

By implementing Microsoft Dynamics CRM, JLL has created a globally integrated, user-friendly solution and a powerful security system that works well with existing technology. The company is excited about the goals it has accomplished and expects to take full advantage of the opportunities to come.

“Microsoft Dynamics CRM helps us understand not only our own capabilities, but also new opportunities we can present to clients, so that we can channel them more effectively. We believe the new system is absolutely key to unlocking new business opportunities arising from the current boom

in real estate investment around the globe,” says Johnson.

Accelerates Time-To-Benefit

Microsoft Dynamics CRM presents a familiar interface similar to that of Microsoft Office Outlook, which increases user adoption and productivity.

“If an employee can format an e-mail or calendar appointment, they can begin learning the system,” says Johnson. “With all the functionality in Microsoft Dynamics CRM, we are gradually getting them hooked and building new functions within the process itself.”

In addition, JLL’s hosted version of Microsoft Dynamics CRM accelerated the initial phase of deployment by six months and helped prepare for a seamless transition when it was time to introduce the system companywide.

“The hosted version of Microsoft Dynamics CRM got us up and running immediately,” says Jennifer Grassan, Project Manager for Jones Lang LaSalle. “Hosting was absolutely the most efficient way to jump start a global deployment and gain the immediate involvement of everyone on this project.”

Fits Securely with Existing Systems

JLL is assured that valuable client data is secure with Microsoft Dynamics CRM. No interactions happen outside the company’s firewall, and data is stored on locally hosted servers. Although ease of use was a selling point for Johnson, he cites security as his primary motivation for purchasing the application.

“As Chief Security Officer, along with my Chief Information Officer title, I am responsible for protecting our important client information,” says Johnson. “With Microsoft Dynamics CRM, I can integrate to my heart’s content and I will never have to go over the Internet or

outside our firewall to do it.”

Improves Client Service

Employees can readily share client data at a global level, enabling JLL to provide better service and greater opportunities to its clients.

“We showed our CEO all of a client’s activities across a region,” says Johnson. “In our eyes, and his, it’s a big achievement to say we can see everything that’s happening for a client in a single shot.”

Jack Minter, Managing Director at Jones Lang LaSalle, uses Microsoft Dynamics CRM on a daily basis. And with the need to travel frequently, he appreciates having constant access to company data. Since the deployment, Minter finds it easier to log calls, track deals, and gain new business—no matter where he is located.

“Microsoft Dynamics CRM provides better performance than ever before,” says Minter. “Connecting to a transparent, global platform gives us quick and easy access to the current data we need.”

Increases Sales

Because some deals require three or four different business sectors to participate, access to data at the global level increases cross-selling opportunities and gives employees throughout JLL’s business lines the chance to close more deals.

“We can now track our multiple business units’ participation in the client opportunity and, ultimately, provide the service that the client needs,” says Johnson.

With wider access to customers, JLL hopes to see increased sales using Microsoft Dynamics CRM. “We can now provide greater sales opportunities for our employees,” says Johnson. “For instance, an investor in the

United States can present an opportunity to a client in Saudi Arabia.”

By replacing 15 disparate CRM systems with Microsoft Dynamics CRM, JLL benefits from a single, fully integrated solution for managing customer data, allowing the company to better serve its global sales force and pave the path for future growth.

For More Information

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For more information about Jones Lang LaSalle products and services, call (312) 782-5800 or visit the Web site at: www.us.am.joneslanglasalle.com/en-US

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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