


CASE STUDY:UTILITY

Synopsis of Case Study:

United Utilities treats and distributes around 2,000 million litres of water a day to, and removes and treats wastewater from, nearly 3 million homes and businesses. It also distributes more than 24,000 gigawatt hours of electricity annually to more than 2 million homes and businesses. With its utility networks sharing a common geographical footprint, United Utilities is a genuine multi-utility with an unrivalled opportunity to pursue synergy benefits from managing these networks.

Consequently, customer contact management is fundamental to the success of the business. United Utilities previously had GoldMine 4 installed but the product was not used to its full potential. The users had received little training and it was essentially used as an electronic Rolodex. In addition, numerous Microsoft Access databases were in use.

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In 2001 the company embarked upon a consolidation programme, bringing its business development efforts into one main office with a small number of remote users in a satellite office. This was the prime time to migrate the existing software to an integrated database package with enhanced features that could be accessed regardless of location.

Business Issues and Challenges:

The utilities industry has become increasingly competitive in recent years, with many providers offering a range of services rather than the traditional model of one supplier for each service. As the number of players in the market has grown, customer retention is ever more important.

United Utilities is a major provider of utilities servicing a huge community of homes and businesses. A team of business development executives manages a pool of 800 corporate customers.

Historically, client information was stored on multiple Microsoft Access databases and GoldMine 4.0. This framework had a number of limitations. Although the information was all held electronically, it was difficult to manage as data was held in several places. In addition, each database was created to run independently of the others making it impossible for the business development team to manipulate the content to create reports showing the status of an account at any given time.

This meant that account queries were time consuming, as a number of account records had to be searched to obtain the full picture. This problem was exaggerated by the fact that information could not be replicated to all databases simultaneously. The outcome was that numerous views of the customer could exist and be accessed by multiple account handlers at any point in time, without the information having first been synchronised. Ian Riley, Business Analyst at United Utilities explains, "This made it very difficult for the business development team to share information between colleagues and offices effectively. Therefore the records served primarily as an electronic card-file rather than a sophisticated client management tool."

Usage of GoldMine Software within United Utilities:

With so many records held on numerous databases, a single solution was needed that would migrate the existing records from their original sources to one integrated solution. It was essential that the new tool could deliver advanced functionality to eliminate lengthy search processes and ensure efficient, instantaneous communication among office-based and remote users.

With limited experience of GoldMine 4.0, United Utilities decided to invest £60,000 in a project to migrate to the latest version of GoldMine Sales & Marketing to manage and centralise communication for its corporate business contacts. The company chose to employ the skills of a CRM company to assist with the upgrade.

Four consultancies were invited to pitch for the contract. Ian Riley comments, "Having made a serious commitment to upgrade to the GoldMine system, it was essential that we understood the complexity of the product to enable us to realise a return on our investment. We were looking for a partner that not only understood the product, but possessed the necessary skills to tailor it to our business and deliver training to our business development team."

Prior Analytics demonstrated skills in each of these areas and was selected based on these criteria. Data migration presented the biggest challenge. Ian Riley explains, "We wanted all of our data in one place without having to re-key any of it. Some of the information was duplicated in more than one database and we didn't want it to appear twice or more in a newly integrated model."

This process presented several technical challenges. However, Prior Analytics worked closely with United Utilities' IT consultants to resolve these issues. Drawing on extensive product knowledge, Prior Analytics was able to create a program that would manipulate the files to ensure that double entry did not occur.

Business Benefits:

Prior Analytics managed the development and installation of the project from start to finish. Both parties appointed a designated Project Manager to ensure that timescales were adhered to and deadlines met. Workshops were used to identify the needs of the system. As a result, the core GoldMine product was customised to provide one view of the customer in any given place at a specific time.

The first phase of the project is now complete. The solution runs on Microsoft's SQL Server V7.0 Platform and is networked using Windows NT 4.0 giving 42 users access to a customised and streamlined customer management database. Ian Riley explains how it works. "The team comprises many remote users. Traditionally this presented problems when it came to project and opportunity tracking as multiple records existed. With the tailor-made GoldMine Sales & Marketing installation we are able to co-ordinate and update our business actions with other team members within a single integrated system."

Claire Robinson, Prior Analytics, comments, "Using the Opportunity Manager feature in GoldMine, United Utilities is able to analyse the status of corporate sales in the pipeline and prioritise how they are assigned within the business development team." She adds, "Relationship reports can also be drawn from the system, allowing business development managers to focus their attention on 'hot' prospects and bring corporate deals to a close."

Once the data migration was complete, Prior Analytics worked with the business development group to provide training for all of the users. As a result of understanding the features and functionality of the system, the company is better placed to retain its competitive position in the marketplace.

The Future:

Through consultation with Prior Analytics, United Utilities has been able to rationalise its business processes for its corporate business group. The next phase is to extend the solution to a regional call centre and focus on the opportunity tracking methods available through the product. This will incorporate more databases to create an even larger centralised resource for the company.



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