

**HITACHI**  
Inspire the Next

## HKS Success Story



 **Hitachi Solutions**

Content Produced by Washburn Communication



### CUSTOMER PROFILE

HKS is creating places that enhance the human experience through innovation, creativity and vision. An architectural design firm leader, HKS operates from 27 worldwide offices. Since its founding in 1939, the firm has completed construction projects totaling more than \$77 billion in more than 1,648 cities in 84 foreign countries.

### INDUSTRY

Services Industry

### LOCATION

HQ in Dallas, TX

## Dynamics CRM Online Customer Story

*After Transforming Architectural Design Worldwide, HKS Turns Inward to Evolve Client Relationship Management*

As the fifth-largest architectural firm in the world, HKS knows how to create exceptional transformations. The company has designed more than 1,600 unique spaces for many industry sectors in 84 countries—ranging from sports venues to convention centers. For property owners wanting to make a significant impact with their building designs, HKS is the ideal architect - focused experts consistently deliver the extraordinary. The company employs more than 1,200 professionals who work in 27 offices worldwide.

With senior partners approaching retirement, HKS decided to execute its own internal transformation. The partners and their business development teams primarily relied on isolated client relationship management systems, so HKS wanted to centralize all client information before the partners retired. Doing so would ensure solid client relationships could be maintained in the future.

“We first attempted to process CRM information within our ERP platform (Deltek Vision), which is designed for the architectural sector,” says Jack Clark, HKS Vice President of Business Systems. “But it was cumbersome to enter CRM data and difficult to integrate with Microsoft Outlook—where business development teams enter most of their client information.”

### The Need to Evaluate Opportunity Profitability and Risk

By bringing client contact information and the years of institutional-knowledge insight that the retiring partners possessed into one centralized database, HKS planned to improve its ability to execute sales and marketing campaigns, and to streamline the process for sales and marketing to exchange data on program performance. Another key area in which HKS wanted to improve efficiency was project qualification and RFP analysis prior to investing resources in pursuing opportunities.

“We needed a methodical opportunity vetting process—particularly in countries where the economy may not be stable,” Clark says. “Before we invest time into an RFP, we not only want to have a reasonable chance of





“Microsoft Dynamics CRM Online functions within our particular sales process. This was a key reason why we chose the solution. As a professional services firm that relies on relationship selling, we have long sales cycles that require precise documentation.”

Jack Clark, Vice President of Business Systems, HKS

winning while achieving sufficient profitability, we also want to ensure we mitigate risk in cases where project financing may be on shaky ground.”

As part of the RFP analysis process, HKS also needs to provide business development teams with access to historical RFPs for which HKS submitted bids. This enables better assessment of the viability of current RFPs.

### **The Answer: Microsoft Dynamics CRM Online**

To take on these challenges, HKS decided to transform its consolidated approach by separating ERP and CRM into two integrated platforms that exchange information. Deltek Vision remained in place as the ERP platform, and HKS began researching new CRM solutions.

Microsoft Dynamics CRM Online and Salesforce.com emerged as the leading candidates. “Microsoft Dynamics CRM Online functions within our particular sales process,” Clark says. “This was a key reason why we chose the solution. As a professional services firm that relies on relationship selling, we have long sales cycles that require precise documentation.”

Another key differentiator setting Microsoft Dynamics CRM Online apart is its seamless integration with Microsoft Office 365. “We rely heavily on both Microsoft Outlook and SharePoint,” Clark says. “So it appeals to our staff that they can work in other Microsoft applications and have client and RFP information automatically flow into the CRM platform. This is more efficient than plug-ins from other CRM solutions that act like Microsoft Outlook but take you out of the application and then sync with their platform.”

### **Project “Go/No-Go” Decisions Streamlined**

Microsoft Dynamics CRM Online also appealed to HKS because the cloud model eliminates the need to purchase hardware and software, and the staff, which primarily utilizes Microsoft Surface tablets, can access the platform without using a VPN. They simply need Internet access where they authenticate through a seamless single sign-on to all online Microsoft applications.

“We also don’t have to worry about upgrades, Clark adds. “Microsoft applies them online, and our data is backed up in multiple locations. The cloud also





“HKS partnered with Hitachi Solutions to implement Dynamics CRM. They were a valuable part of the team in helping guide HKS through the configuration and implementation of Dynamics. Their guidance in keeping us on track and ensuring we were following best practice in configurations was very valuable.”

Jack Clark, Vice President of Business Systems, HKS

reduces system admin time so we have been able to redeploy resources to other IT tasks.”

HKS also significantly transformed what Clark refers to as the “Go/No Go” decision point of the client opportunity process. Microsoft Dynamics CRM Online takes business development teams through a qualification questionnaire for which they must achieve a certain score to convert an opportunity into a project with an assigned project number. “This is important because only then can we start logging billable time,” Clark explains.

Senior executives at HKS appreciate what Clark has accomplished. The company now focuses resources only on the RFPs executives truly want to pursue. With the staff no longer bogged down by risky opportunities, HKS produces more effective responses to viable opportunities.

#### **Stage Set for Maintaining Strong Client Relationships**

With RFP analysis working smoothly, HKS is now working to improve the effectiveness of marketing campaigns by facilitating sharing of client and contact information between sales and marketing teams. In the near future, Clark’s team will work on connecting the CRM platform to Microsoft SharePoint and streamlining email marketing campaigns.

“We now have a centralized CRM platform for which it’s easy to import and export data with two-way integration to our ERP, email, document management and marketing campaign applications,” Clark says. “We have also transformed client relationship management so we are prepared when retiring partners pass the torch to future partners to ensure our client relationships remain strong well into the future. Our goal is to ensure clients have full confidence that we understand their needs and their business—as demonstrated by the thoroughness and accurateness of the information and insight brought into every interaction with anyone on our team.”

