



Winery Harvests New Marketing Opportunities with Microsoft CRM

Overview

Country: Canada

Industry: Food services

Customer Profile

Based in the Okanagan Valley in British Columbia, Mission Hill Family Estate produces award-winning wines that are enjoyed the worldwide.

Business Situation

In April 2006, Mission Hill needed a system to centralize customer information and help it enhance the guest experience.

Solution

With the help of Ideaca, Mission Hill deployed Microsoft® CRM, now part of Microsoft Dynamics™, which helps the winery track client lists and better market services to customers.

Benefits

- Harvesting customer feedback
- Ripe cross-sell opportunities
- A familiar, intuitive interface
- More efficient operations
- Marketing services with taste

"Microsoft CRM integrates easily with tools like Microsoft Outlook and Office, offering Mission Hill employees a productivity tool that is easy to use and very familiar."

Brian Bonnor, Consulting Manager, CRM, Ideaca

Over the past decade, British Columbia has become one of the world's great wine regions – due in large part to wineries like Mission Hill Family Estate. Based in the Okanagan Valley, Mission Hill produces award-winning wines that are enjoyed the world over. In April 2006, Mission Hill needed a system that would centralize guest information and comments to help it to enhance their experience with Mission Hill. With the help of Microsoft® Gold Certified Partner Ideaca, Mission Hill deployed Microsoft® CRM, now part of Microsoft Dynamics™. Since deploying the solution, Mission Hill has been able to better track its client lists, improve customer service, capitalize on cross-sell opportunities and develop innovative marketing strategies to draw in more customers.

Situation

Shortly after graduating from Vancouver's University of British Columbia, Anthony von Mandl set out to make winemaking his life's work. After completing a wine apprenticeship in Europe, von Mandl planted his roots in what was then the largely unknown Okanagan Valley region. Together with his family von Mandl founded Mission Hill Family Estate in 1981. Mission Hill has since become renowned for its award-winning wines and attracts hundreds of visitors each year to its estate.

To help promote its brand Mission Hill needed a way to enhance the customers' experience and provide service that would appeal to connoisseurs and novices alike. To do this, it needed a way to track information on prospective and existing customers and the ability to catalogue this data efficiently.

"We didn't want to store our customer information in a way that would make our jobs more challenging. We wanted to get it right from the start," said Ingrid Dilschneider, Manager of Winery Marketing and Guest Services, Mission Hill Winery.

Lack of information sharing was another issue facing Mission Hill. Marketing staff specialized in different areas of the business - for example, one person might handle the marketing of onsite culinary courses, while another might organize wine tours. Using solutions such as Microsoft Excel® spreadsheet software and Microsoft Outlook® messaging and collaboration client helped employees to create their own customer files and capture relevant data, but the results were not being shared across the organization. This meant the winery was missing opportunities to cross-sell different services to customers.

"Our marketing efforts were siloed because staff did not have a complete view of our

customers. We lost out on opportunities to promote Mission Hill and grow our revenue," says Dilschneider.

Solution

In early 2006, Mission Hill looked into leveraging Microsoft® CRM, now part of Microsoft Dynamics™, which had already been deployed by its parent company Mark Anthony Group. After meeting with Ideaca, a Microsoft® Gold Certified Partner, Mission Hill realized that Microsoft CRM could offer users more than an automated customer contact list.

"Initially, the goal of this project was for simple contact management system. However, Ideaca showed us how Microsoft CRM could help us improve the overall experience for our guests," says Dilschneider.

With the help of Ideaca, Mission Hill Winery leveraged its existing corporate IT infrastructure and tailored Microsoft CRM to meet its business requirements. For example, Ideaca implemented a comment card capability that allows Mission Hill to store the latest feedback from visitors to the winery in one central location.

"Hosting this information in one place makes it available to everyone, which helps us from a customer care perspective. If any issues arise, Microsoft CRM flags it immediately so we can quickly take action to resolve the problem," says Dilschneider.

With the wine season close on the heels of the April 2006 deployment, Mission Hill had a small window in which to roll out the system. Since Microsoft CRM proved easy to deploy, integrate and configure with Mission Hill's existing Microsoft-based infrastructure, Ideaca had the solution up and running within two months.

"The customizability of Microsoft CRM made it easy for Ideaca to tailor a system that is suited for the unique requirements of Mission Hill's business," says Brian Bonnor, Consulting Manager, CRM, at Ideaca.

Benefits

Summer is the high season for winery visits, and Mission Hill needs to focus nearly all of its marketing opportunities over a span of several months. With the help of Microsoft CRM, Mission Hill has quickly established a database of its customers, complete with demographic information that can help the winery hone its marketing strategies.

Microsoft CRM also offers Mission Hill a full suite of sales tools that integrates seamlessly with its current Microsoft-based environment.

"Microsoft CRM integrates easily with tools like Microsoft Outlook and Office, offering Mission Hill employees a productivity tool that is easy to use and very familiar," says Bonnor.

Harvesting Customer Feedback

Previously, marketing staff owned different portions of Mission Hill's customer information, with no one able to build a complete picture of customer activity. As a result, Mission Hill missed out on opportunities to up-sell different products and services to its customers.

"The relationship management capabilities of Microsoft CRM will definitely help Mission Hill in future marketing efforts as well as effectively managing their members," says Bonnor.

Since deploying Microsoft CRM, the winery has centralized customer demographic information, such as age, gender, consumption frequency and wine preferences. Keeping this information in one location enables the winery to track its different segments.

"Storing this data centrally gives everyone access to the information. It allows different departments to uncover trends they wouldn't have otherwise noticed. For example, a person who completed a wine tour might be shown to be a candidate for a wine tasting course," says Dilschneider.

Ripe Cross-sell Opportunities

As well, Ideaca implemented its C360 Web connect software that captures customer interest from the Mission Hill Web site and feeds it into Microsoft CRM. If a wine enthusiast clicks on a Mission Hill banner ad for an Okanagan tour, the Web connect automatically generates a lead for the marketing team that is captured in Microsoft CRM.

"No matter where a customer enters the Web site, the Web connect piece will identify cross-sell or up-sell opportunities for other areas in Mission Hill. Our marketing staff can then pull out those leads from Microsoft CRM and act on them immediately," says Dilschneider.

Marketing Services with Taste

Previously, client information was scattered throughout the organization which made targeted marketing initiatives more difficult. Centralizing the client data has helped develop innovative marketing strategies that set it apart from other wineries.

For example, Microsoft CRM helps Mission Hill identify key VIP guests, such as politicians, and celebrities, and extend premium services to those customers.

"Microsoft CRM has helped us break down our customer list in such a way that we can really target their specific needs, which really reinforces our brand," says Dilschneider.

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