

National Bureau of Property Administration Uses Infor CRM SLX LAN to Stay at the Top of Its Industry

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Company Profile

Chicago based National Bureau of Property Administration (National Bureau) is a property tax consulting firm, whose sole focus is minimizing the property tax liabilities for their commercial and industrial clients in all 50 states. Established in 1935, the National Bureau is the oldest firm in their industry and they got that way knowing the value in nurturing relationships.

Company Stats:

- Industry: Government
- Employee-owned
- Relationships with clients and taxing jurisdictions are measured in decades
- Number of Employees: 21; VERY low turnover contributes to expertise and long-term relationships
- Staff of Senior Consultants averaging more than 20 years of experience

Business Situation

The prior implementation of Infor CRM wasn't meeting the needs of the National Bureau. The former consultant had extensive, complex code in place which had been touted and sold as a necessity for proper relational table communications. Katie Testolin, Project Manager with National Bureau, stated it was as a result of this code constantly "breaking" that prompted them to reach out to Technology Advisors Inc (TAI). In their initial assessment of the problems, TAI discovered even the simplest, in-the-box features, such as the Group Builder, was failing to perform due to the custom code. Troubleshooting to find and correct all of the breaks was going to be time consuming, resource-draining, and ultimately futile. Adding to this futility, National Bureau was told that the only option to generate the business intelligence that they and their clients needed was an add-on reporting tool.

PROJECT OPENING DESIRE: National Bureau engaged TAI to implement and migrate from troubled Infor CRM SLX to the new Infor CRM SLX Web simply because they assumed the LAN version was flawed.

“...[Our] custom code was constantly breaking. Troubleshooting issues and managing bad data became overwhelming.

- Kate Testolin, NBPA

Technical Situation

In the normal course of preparing for the extraction of data from this broken system, Valerie Parker, TAI’s project manager assigned to design and deliver National Bureau’s new CRM SLX solution, discovered “twisted” nonsensical code; “a spaghetti bowl of data” that didn’t satisfy even the basic requirements. This made all things National Bureau needed to accomplish all the more difficult. There were structural flaws in relational tables which caused misinformation, missing data and duplications.

The structure caused integrity issues in the solution. Valerie reports, “The database needed to be normalized, duplicates removed, and logical relationships between correct and valuable tables needed to be created.” Additionally, National Bureau needed functionality to streamline their business and to replace systems that kept breaking. It became evident that National Bureau needed Infor CRM SLX LAN to work the way it was built to work, and to utilize features they were unaware existed. From TAI’s perspective, the challenge of this project other than “Spaghetti bowl” of data they inherited was not just a CRM tool, but a full-business system. TAI had to understand the detail-heavy nuances of the business in order to deliver the requirements of National’s technical needs.

PROJECT EYE OPENER: Infor CRM SLX LAN was indeed the product National Bureau needed. Attributed directly to the extensive knowledge of the Infor CRM SLX product line, TAI was able to show National Bureau that spending more for an implementation was not necessary. In this instance, rebuilding on the LAN was certainly better than replacing with another product.

Solution

Technology Advisors heard what the client needed, not simply what the client had requested. Infor CRM SLX LAN was the right tool for National Bureau after all. Technology Advisors had to show this to National Bureau and prove the potential. TAI designed and implemented a system using the many SLX in-the-box features desired by National Bureau. TAI created solid database architecture which prevented the problems of the past. TAI implemented a data warehouse structure and recommended a business process which would create a virtual and continually updated library of the National Bureau’s knowledge of the 50 State’s taxing and assessing jurisdictions’ key deadlines, laws and procedural requirements.

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Customized Infor CRM SLX LAN replaced a manual process that consisted of printed reports and check lists that were manually routed around the office. Tackling National Bureau’s need for restoring stability and bring back confidence in their data, TAI delivered a few proprietary innovations and program add-ons to create data validation features such as summary screens which could display calculated figures and facts which corroborated with the data of more detailed screens.

- Kate Testolin, NBPA PROJECT GEEK SPEAK: National Bureau’s system is composed of four primary entities: Client, Opportunity, Site and Location. In addition, there is an entity to contain

system wide governmental/ jurisdictional Information that varies with time. Each of the primary entities is composed of, and/or related to, other entities.

The Client entity is represented by the Infor CRM Account. It is composed of contacts who are either related to the client or is potential real estate owned/leased by the client, but not yet under agreement by National Bureau. Beyond client information, all contact information is now stored in Infor CRM SLX LAN, which includes vendors, attorneys, and state and local government officials. Opportunities go beyond the typical opportunities found in a sales funnel. It was extended to include billing information (contract years/contract fees), annual fees, and integration with their invoicing system.

Opportunities have sites/locations associated with them and parcels associated with each location. The location and parcel records are assessment year based, allowing users to change property information as needed annually. This also allows National Bureau to track the historical changes in property over time. For example: for one assessment year, Infor CRM currently tracks over 1500 locations with 2318 parcels comprising over 107 million square feet of property. Due to their high customer retention rate, they track 20 years and counting of history on each parcel. This is key to their success and why have they have such a high retention rate.

The system now contains forms to support each of these entities for adding, editing, and deleting, as well as navigation elements to easily move around the system.

Benefits

Reliable housing of data, in an error free CRM environment is not touted as a benefit by TAI, rather it is the minimal benchmark of this, or any TAI guided project. With genuine concern and empathy for National Bureau, TAI delivered a system that not only meets National Bureau's current needs, but has also laid a foundation for the evolution of the company.

National Bureau has realized a very real and immeasurable increase of confidence in their database; they have reported savings in time and employee resources. When asked about their relationship with TAI, Katie had this to say:

"Sam's group was above and beyond to work with. They were able to walk through National's business, internalize it, analyze it, and customize it. I am blown away by their competency in understanding our business. [I am] so incredibly impressed: from Val to Allen to the Helpdesk to everyone. Technology Advisors listens, and then provides strategic and tactical guidance to solve the problem, and also think future. Extremely impressed."