

Capturx Case Study

Microsoft Technology Centers (MTCs)

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FOR SURVEYS AND CRM



Summary

Customer: Microsoft runs 27 MTCs worldwide to show customers innovative technologies to start the process of envisioning, designing, and deploying solutions.

Challenge: Quickly processing and responding to large amounts of survey data so MTC managers can fine tune presentations.

Solution: Capturx for Microsoft SharePoint Server and digital pens capture and send digital survey data to the SharePoint Server and Dynamics CRM.

Results: Teams get faster access to survey data, with less administrative work, to learn and adapt to better serve customer needs. Convenient pen-and-paper interface makes it easy for participants to share

Microsoft Speeds Customer Feedback with Capturx-based Surveys and SharePoint

Microsoft provides customers with a broad range of products and solutions which can be architected and tailored to meet the very specific needs of enterprises. To help enterprises understand the full range of options, Microsoft runs twenty-nine Microsoft Technology Centers (MTCs) around the world. The MTCs are collaborative environments for customers, providing access to innovative technologies and world-class expertise to help envision, design, and deploy solutions.

To ensure that participants are getting the most out of their MTC experience, the MTCs collect detailed feedback about each engagement through surveys. Participants complete paper surveys with digital pens and Capturx for Microsoft SharePoint Server, which integrate the data into Microsoft SharePoint and Dynamics CRM for faster sharing, analysis, and response times to customer feedback.

Challenge: Quickly Processing Survey Data

Hundreds of customers and partners visit the MTC each month to participate in strategy briefings, architecture design sessions, and proof-of-concept workshops. To gauge the effectiveness of each session, each participant completes a paper survey covering session topics, speakers, and asking for other feedback. Paper has been a convenient medium, since it's familiar and easy for participants, who can complete the various sections at their own pace throughout the engagement. The MTC staff would then take the surveys and manually transcribe the data into Dynamics CRM. After transcription, the data would be shared with the relevant presenting and account teams.

The MTC managers use the data in a variety of ways, including fine tuning presentations and responding to specific customer issues. Manual data entry not only creates extra work, but also delays access to the data. For teams doing back-to-back presentations, fast access to data was important so they could make adjustments before future presentations. They could also get important customer feedback to account managers.

The team wanted to instantly capture the data in Microsoft SharePoint Server and Dynamics CRM, so they could take advantage of notifications, workflows, and structured data analysis. At the same time – they wanted to keep a paper option – to make it easy for participants to quickly jot feedback without waiting in line for a kiosk or having to do a web survey long after the fact.

Solution: Capturx for SharePoint & Digital Pens

To make it easy for participants to fill out data on paper and to get rapid data access into SharePoint and Dynamics CRM, the MTCs turned to Alliance Partner, Adapx, to implement a Capturx for SharePoint forms solution using digital pens. With Capturx, the MTC team was able to upload their existing forms into the

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CHUCK MCCANN

Director of the Microsoft Technology Centers

Capturx for SharePoint application running on the MTC's SharePoint Server, where a workflow application loads them to Dynamics CRM. Forms can be completed using tablets or with digital pens on plain paper. When forms are printed for use with digital pens, Capturx software automatically creates a faint and unique watermark – similar to a 2D-barcode – in the background of each form. As participants fill out the forms, the digital pens scan the watermark and record the data. When the pens are connected to a PC, Capturx automatically uploads the data into SharePoint, where it is accessible in the original handwriting and as converted digital data using powerful character recognition.

Access to the converted data in SQL, SharePoint, and Dynamics CRM enables easy sorting and analysis by topic, presenter, date, or customer. Account teams can also see scanned version of each form in the original handwriting. SharePoint is configured to make it easy for presenters and account teams to quickly see all the data that is relevant to them, in a single place. Data is also automatically integrated from SharePoint Server into Dynamics CRM, so account teams can easily access details about the MTC sessions as part of their permanent customer records.

Teams can also adjust existing forms, add new questions, or create brand new forms on their own – by simply using Excel to lay out forms which are easily uploaded into SharePoint.

Results: Streamlined Survey Data Processing

Faster access to data aggregated into SharePoint and CRM

With Capturx, all the data from each session is aggregated on SharePoint. Presenters and account managers can see results quickly – allowing them to immediately adjust future presentations to address important customer issues that are noted in forms.

Less Work

By eliminating transcription – the MTC teams can dramatically reduce the person-hours spent entering and processing data for each of the sessions. Teams can minimize administrative tasks and focus on higher value engagements with customers.

Easy for Participants

Capturx for SharePoint also helps Microsoft reinforce key customer messages around innovation, the power of Microsoft technology, and customer responsiveness. The familiar and convenient pen-and-paper interface makes it easy for participants to share feedback. The more feedback the MTCs get, the more they can learn and adapt to better serve those customer needs. With the Capturx tablet solutions – participants will also be able to capture data using the same Excel-based forms on tablets. All the data is aggregated onto the same locations in SharePoint, with the same views and permissions.

In addition to Microsoft responding faster to participants, Capturx also provides a great showcase for the power and flexibility of Microsoft Office through familiar and powerful tools like Excel and SharePoint.

"The MTCs provide customers with collaborative environments and access to innovative technologies," said Chuck McCann, Director of the Microsoft Technology Centers. "Capturx provides an innovative way to get data from paper into SharePoint and CRM, helping Microsoft collaborate and respond to customers faster."