



## More efficient project management through context-based working

Witte Projektmanagement GmbH, a successful German Construction Management project management business, has for many years used Microsoft® Office for its daily project communication to its Clients and employees for things such as daily correspondence and the preparation of project data sheets.

Witte Projektmanagement wanted to dramatically improve the management of address and project information, and, to have better and consistent data quality. They employed the German System Integrator disserto management gmbh to implement Microsoft® Dynamics™ CRM 4.0 for centralized management of all address and project information. A key requirement of Witte Projektmanagement was that all address and project data must be maintained in one place only, to be easily available to all employees, and that everyone had access to the most current and up to date information. To achieve this, the solution required more than just the deployment of Dynamics™ CRM, disserto recommended the deployment of Combionic software to compliment the Clients current use of Office and add even more value to the deployment of the new CRM tool.

### Solutions

The access to information and data from Dynamics™ CRM is ensured with Combionic Office Business Gateway from Combionic, which allows the context-based access and editing of information from business applications like Dynamics™ CRM directly out of Microsoft® Office. This resulted in several significant improvements immediately. Employees can now directly access project information within Microsoft® Dynamics™ CRM 4.0, while creating a Word document, such as a letter. So you don't have to toggle between applications in order to get relevant information during the creation of a client mailer or a project document. When an employee creates a document for a project, the contextual filter of Combionic Office Business Gateway provides available information associated with the project companies, contacts and information by default.

Furthermore, text blocks in Microsoft® Word can be filled with live data from the CRM address and project management database. Customer letters can be created, for example, in Microsoft® Word using data from Dynamics™ CRM. Combionic Office Business Gateway created a way to search through all existing records without leaving Microsoft® Word and insert the relevant information accordingly into the letter. Additionally, intelligent document templates allow users to dynamically save the document with or without a company logo in the header at one mouse-click. This feature is especially useful if you want to print documents on both a letterhead and in pdf format for archiving needs.

Marco Witte, CEO of Witte Projektmanagement GmbH says: *„With Combionic Office Business Gateway we always directly access current data from the CRM system out of our Microsoft® Office environment. In the past we had to open multiple applications simultaneously for one process, and retrieve the data and then export. Today we maintain one database and the rest updates automatically. This saves work effort, time and mistakes can be avoided.“*

## Customer Reference

### Overview

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- Marco Witte, CEO  
Witte Projektmanagement



Headquarters: Berlin  
36 employees, 42 PCs

Request: Current and easy to find project and address information.

Software:  
Combionic Office Business Gateway 2010  
Microsoft® Dynamics™ CRM 4.0  
Microsoft® Office Professional 2010

Results:

- Significant time-savings
- Reduction of the failure rate to a minimum

Realisation:





## Value and prospect

With the implementation of Microsoft® Dynamics™ CRM 4.0 and the Office Combionic Business Gateway, Witte Projektmanagement GmbH was able to achieve significant time savings. In addition, the failure rate was reduced to a minimum.

Due to the success of this solution the next steps will be to implement a Change Management in Dynamics CRM for project management. This will be realized with the integration of Combionic Office Combionic Business Gateway in a Microsoft® Excel® form. Data can be selected from the CRM system and is displayed in Microsoft® Excel®, which can be used as the interface to entry data by the user. All data is exchanged bidirectionally between Microsoft® Excel® and the CRM database. Changes are written back directly into the database through the Combionic Office Business Gateway. The correctly completed form can be printed afterwards.

### About Witte Projektmanagement GmbH

Witte Projektmanagement deals with nationwide project management of most commercial construction projects since 1993. In addition, Witte Projektmanagement offer support regarding project controlling, technical contract controlling, providing of technical due diligences and monitoring of building certification in compliance with DGNB standards. Meanwhile, 36 employees support ambitious projects for prestigious clients in the commercial and residential construction, including 29 experienced engineers / architects.

### About disserto

The disserto gmbh is a comprehensive consulting and development company. Its portfolio ranges from strategic consulting and design, custom development of software solutions to system integration in heterogeneous IT environments.

Focus of the companies activities are infrastructure and integration projects, customer portals and tailored systems that target successful document, campaign or employee management.

### About Combionic

Combionic is a pioneer for the modern workplace. Its software connects people, processes and information in context and across applications. This in turn creates a significantly more productive, compliant, and user-driven working environment. Combionic is the recipient of a Microsoft Innovation award and collaborates closely with Microsoft on the development and implementation of the company's "Government Workplace Modernization" initiative.

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## Customer Reference

### Further information

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#### Realisation

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