

CASE STORY

LRM

Theo Donné - CFO

LRM's growth requires professional systems

LRM, an investment company from Limburg, is growing rapidly. The increase in data also means more information has to be kept in a structured manner. "At some point in your company's development, you will lose the overview and you will have to start using software to manage all documents", Theo Donné, CFO, says.

In cooperation with a consultant, LRM drew up specifications for a system that centralizes its project, record and commercial management. Cegeka emerged as the best partner from the selection, which was organized in the form of a public tender. "Their proposal was in line with our requirements. We wanted very user-friendly software, and that was more feasible with Cegeka's approach", Lindsay Vanaudenhaegen, project coordinator at LRM says.

Like many other companies, LRM used to have a file server on which all project documentation was stored. "The information was centralized and relatively well protected, but that was it. For instance, it did not ensure that everyone saves information in the same way. Cooperating, sharing contacts, searching the status of a dossier, performing analyses or collecting data for directors took a lot of effort", Lindsay Vanaudenhaegen says.

" We are managing our business information in a better way now. We had to do that, because our product is money, and we invest it into companies in Limburg. "

THEO DONNÉ
CFO

Automatic working processes

To make everything easier, the files are now stored in project sites in Microsoft SharePoint, and linked to structured information in Microsoft Dynamics CRM. The CRM software does more than just store data. "We also use it to launch working processes, employees receive

automatic alerts when deadlines are approaching, you can request different custom reports, version history is saved for important reports, etc.", Sven Vanoirbeek, project manager at Cegeka, says.

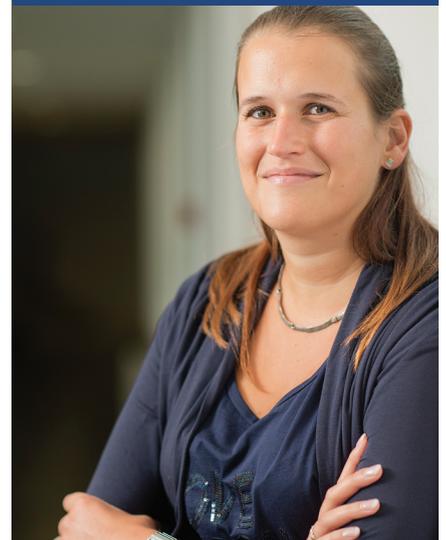
The project kicked off with an in-depth analysis to map LRM's operations. Then Microsoft Dynamics CRM was configured. LRM uses it to store all data for customers, potential customers and everyone who interacts

with the company in a central location. You can also view the contact history with an overview of all relevant e-mails and appointments. ►



ABOUT LRM

As an impact-driven investment company, LRM is the catalyst for the transition of the "production economy" in Limburg towards an innovative and high-tech economy. With its unique combined offer of venture capital and infrastructure, LRM contributes to the transition of Limburg's economic DNA. "Oxygen for growth!"



CHALLENGES:

- **Complex business logic and reporting**
- **User acceptance**
- **Governance.**

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Access to this information is controlled, so only people responsible for the specific dossier and the management can access it.

The database also includes data about companies, contacts and LRM's commitments. Important documents, such as contracts, are also linked to the relevant companies. Lindsey Vanaudenhaegen: "When a colleague is absent, we can quickly consult sufficient information to make decisions in a specific dossier."

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CFO

Real-time turnover forecast

"This automation project goes beyond storing information in a uniform and intelligent manner", Lindsey Vanaudenhaegen says. "We mainly want to have an adequate overview of the use of our financial resources and cash planning. We used to have that information before, but we had to retrieve it from our files manually, which sometimes took a lot of time."

LRM uses custom reports to retrieve information directly from its IT systems: which dossiers are being analysed and which resources are required to participate, which dossiers have been approved, have the contracts been concluded, has the money been deposited, what are we monitoring? "We are able to work in a more focused and accurate manner, since our investment managers and other employees can request the status of dossiers at any time", Lindsey Vanaudenhaegen says. As user-friendliness is very important, Cegeka

has ensured that all information will appear on screen in no more than four clicks. "Most of the time, one click is enough to get the whole overview", Sven Vanoirbeek says. "We have created an overview screen that shows the main

contacts, contact history and outstanding commitments directly, so we can follow up on companies in our portfolio. It is a very efficient system."

Information always within reach

The ability to react more quickly and more accurately is essential to LRM. The loan and investment business poses a few risks.

"If a company in which we have a participation is in trouble, we want to know quickly where we stand and how we can help them, and within what term", Theo Donné says.

Accurate information is important to perform well as a director in a company. Theo Donné: "Our investment managers are directors in the companies in which we invest. We can now prepare more quickly, for instance for meetings, and we are sure that we always have the latest information.

Our product is money, and we invest it into companies in Limburg. We have to keep all information about that in an adequate manner. This project promotes the professionalization of our systems. It benefits all of our employees, customers and dossiers", Theo Donné concludes. ■



SOLUTIONS:

- Business analysis
- Application development
- CRM



TECHNOLOGY:

- Microsoft Dynamics CRM
- SharePoint Server
- SQL Server
- .NET development

