

BDO Simpson Xavier Limerick adopts Sage CRM Mid Market Edition to deliver key marketing objectives.

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Mark O'Connell

Marketing Manager, BDO Simpson Xavier Limerick

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CRM Mid-Market Edition

Case Study

Introduction

BDO Simpson Xavier Limerick is a member of the BDO International Network, specialising in helping Irish orientating businesses successfully grow, by using its professional expertise with their intrinsic understanding of the Irish market.

Prior to purchasing Sage CRM Mid Market Edition, BDO used a mixture of spreadsheets, databases and in-house contact management systems to deal with its customer base. Each department within BDO Limerick (Corporate Finance, Tax Planning, and Audit Services) held information independently and each of the systems that they did use lacked some key functionality.

Mark O'Connell, Marketing Manager at BDO explained, "We had two serious issues undermining the effectiveness of our marketing activities. Firstly, we had silos of information in each department so cross and up selling opportunities were being missed. Secondly, we lacked a strong product with the functions, tools and automation features that we needed to collect and track information, and on which to run campaigns."

With this background the search for a CRM solution began.

The Selection Process

With the recognition that BDO was not maximising its marketing potential with its existing systems, an internal workshop was undertaken to identify the areas where a CRM system would be useful and who the key users would be.

The summary conclusion of the workshop were:

- To increase the number of sales opportunities
- To track and monitor all marketing initiatives
- To ensure enquires were dealt with effectively
- To increase the knowledge of customers and the market through better data accuracy
- To ensure there is a central location to hold customer information
- To share information across all departments
- To provide better information on marketing and sales investments
- To provide a solution that would grow with the future plans of the company

Charged with these requirements the purchasing team evaluated half a dozen competing solutions. The deliberations however were not long-lasting as Mark O'Connell explained, *"There were a number of similar products on the market at the time, however when we looked at Sage CRM MME it provided us with all the basic functionality we needed but also a lot of other features we were not even aware existed, and all at an extremely good price."*

The Implementation

The implementation and configuration of the new system went smoothly. It was a well-planned, phased approach with some of the phases running in parallel. From the planning stage right through to execution took four weeks. The first step in the initial project was to list the key users, user groups and affirm the benefits that they would derive from the system. This research formed the basis for all work on the project and ensured that all users saw a real benefit in using the system.

The second step was a data-cleansing project. Important in any CRM project is to take the opportunity to cleanse the data and pull it together into a single system. BDO's technical team had to import data from various sources which then had to be file-matched, de-duplicated, cleansed and formatted for the CRM system. Sage assisted in the development of a 'Data Mapping/Data Input' plan, which may sound like a daunting project but was actually fairly straightforward. Mark O'Connell explained *"An open line of communication between Sage and BDO was established immediately which made the implementation process extremely efficient."*

Also on the technical side, BDO had a separate dedicated server to run MS SQL Server (the database server), MS IIS (the web server technology) and Sage CRM MME. This allowed for development and configuration of the system without impacting on other BDO Simpson Xavier applications. It also ensured the continuing maximal performance and scalability of Sage CRM MME as it went live.

In order to meet the project deadline several tasks were overlapping or running in parallel in the project plan, which included training, data validity and configuration. Mark O'Connell explained *"Complete buy-in for all users came after user testing was completed. Configuration included easy-to-use onscreen tools allowing the marketing department to modify fields, screen, tabs and security settings in line with its departmental requirements."*

What does Sage CRM MME deliver to BDO?

BDO takes an active interest in its clients businesses and aspires to act as true business advisers, not just accountants or tax specialists.

BDO uses Sage CRM MME to trigger call backs on Property and Tax publications, follow-up calls on marketing initiatives and to track and monitor the progress of enquires.

Mark O'Connell explains, *"We needed a system that would track all publications that went out to our customers within a given quarter. With Sage CRM MME you can see which publications, newsletters and updates customers have received and all interactions following the receipt of these. There have been a considerable amount of cross-selling opportunities generated. Customers calling in response to an update are now automatically informed of other services that are available, thus ensuring we are making the most of every customer interaction."*

Using Sage CRM MME, BDO plans and designs marketing campaigns within their CRM System. It also tracks response rates, which allows them to evaluate the effectiveness of each campaign. All marketing campaigns are set up within Sage CRM MME.

Mark O'Connell continued, *"Our most recent initiative, our 'Quarterly Client Newsletter', has triggered numerous enquires not only about our core financial services but about all our additional professional services. We are also executing more targeted marketing initiatives across all our sales channels to ensure the uptake of all our services continue."*

The next phase for BDO is to carry out an evaluation of the impact Sage CRM MME has had on their company and present the findings to the management board in Dublin.

"Sage CRM MME has assisted us in the delivery of our marketing strategy by providing better, faster and more accurate information. We can now see where activities in one department can create opportunities in others."

KEY ACHIEVEMENTS

Easier Tracking and Management of Marketing Efforts

BDO is using Sage CRM MME to help develop a comprehensive view of each customer and prospect.

More Targeted Campaigns

Sage CRM MME key attribute profiling enables BDO to build up a detailed profile of their customers and prospects over time. Key attributes can be stored, reported on and used as a basis for future marketing.

Improved Ability to Serve Customers

Sage CRM MME provides real-time access to relevant customer data including marketing publications, services uptake, enquires, interactions, multiple contacts.

Support for Cross-Selling and Up-Selling Efforts

Cross-selling and up-selling products and services are a major source of sales revenues for BDO. Sage CRM MME is designed to support such sales initiative, evaluate the success of previous campaigns and fine-tune marketing strategies to better target cross-sell and up-sell opportunities.

About About BDO Simpson Limerick

BDO Simpson Xavier is a member of the BDO International Network, the world's fifth largest accountancy organisation with representation in more than 90 countries across the globe. BDO Limerick specialises in working with growing businesses across a range of sectors. With BDO Limerick's existing contact management system, tracking customer interactions and building complete customer profiles was becoming more and more of a challenge. BDO Limerick tended to view customers at a department level and only the customers they were dealing with, not in totality across the company.

About Sage

Sage is a global provider of end-to-end business management applications for mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Integrating powerful front-office Web and wireless capabilities with back-office accounting and operations, Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit www.sage.co.uk or contact us at crm@sage.com