

The Boxwood Group

Introduction

Boxwood Group is a consultancy dedicated to improving business performance by introducing and embedding operational excellence. They do this through the provision of a number of management, recruitment and training services to their client base. This entails a combination of strategic and process consultation; recruitment for key positions; training and education for existing staff; and selection and recommendation of technologies to improve efficiency. This is a complex product set to manage for the company and prompted the need for a customer relationship management system to handle it. In addition to handling the complexity of relationship with their existing client base, Boxwood needed a system to help with their own needs in business development and marketing in general and to develop leads for their services.

David Cook, Head of IT at Boxwood Group and the person with main responsibility for the introduction of the CRM strategy within Boxwood commented “What we needed was something more than contact management, more than off-the-shelf SFA (Sales Force Automation), or a simplistic electronic marketing tool. At the same time, with a maximum of 75 users right now, an enterprise-level CRM solution would be way over the top in both cost and implementation time. We discovered in ACCPAC that we could get the level of depth, broadness of function and ease of implementation that we needed and at a cost that was realistic. In terms of a fit for us it is ideal.”

The Drivers for selecting ACCPAC

Boxwood Group has reached an interesting stage of their development. After four years they had realised that existing systems were not going to scale with the size and ambition of the company. Positive word-of-mouth led Boxwood to evaluate ACCPAC as a possible solution for their contact management, business development, marketing, recruitment and training course needs.

The company had a need for a lot of the standard functionality that ACCPAC provides, for its sales and marketing teams in particular. But in order to match the needs of the company exactly, David Cook knew that there would need to be considerable customisation to take place. “The fit that we were looking for fell into the category of the 80/20 rule - 80% standard, 20% we would have to customise ourselves. But, having been involved in numerous technology implementations both here and with clients, that 20% can be difficult to achieve, critical as it is for the ultimate success of the project.”

Like any CRM implementation there had to be considerable corporate buy-in for the project, and some changes in the business development processes and other tweaks to how the business is run within Boxwood in order to make the company’s activities more effective. What the company could not afford was to develop a situation where the technology did not map these processes to the letter and occasioned technology-led and not business-led process changes.

The key determining factor for Boxwood then was the “Entity Wizard” available from ACCPAC. The Entity Wizard allows new fields, functions and pages to be built in the ACCPAC system and populated throughout the solution automatically and rapidly. As David Cook explained “this tool allowed us to build, very quickly, a solution that is custom-built for Boxwood. I did not expect that in the 4 weeks allotted to the implementation of the solution, including integrating it with MS Exchange and MS Office XP, that we would be able to go as far as we did in incorporating and now running our four very diverse user groups on the system – marketing, business development, recruitment and training.”

THE CHALLENGE

To implement a cost-effective CRM solution in a mid-sized organisation, scaling to a current maximum of 75 users. To customise this solution to embrace recruitment and training divisions as well as implement marketing and sales functionality. To do it all rapidly.

THE BENEFITS

Rapid Deployment.
Single source for all prospect and client information.
Single system shared amongst all customer-facing users in the company.
Integration of familiar MS technologies for ease of acceptance.
Marketing campaign automation.
Sales force automation.
Analysis and forecasting on sales pipeline.

TECHNOLOGIES INVOLVED

ACCPAC for Marketing
ACCPAC for Sales
ACCPAC Entity Wizard
MS SQL Database
MS Exchange
MS Office XP



The solution and what it delivers

The solution at Boxwood can be drawn as follows:

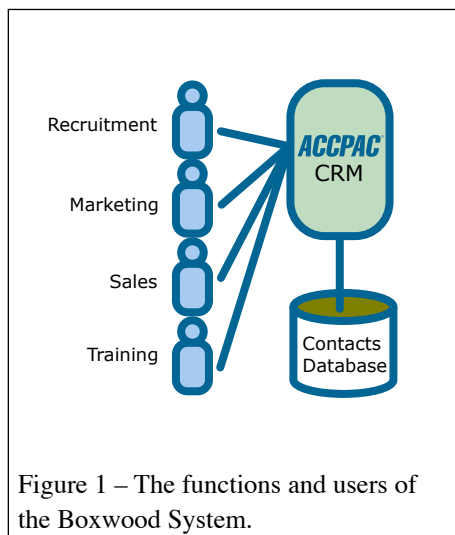


Figure 1 – The functions and users of the Boxwood System.

All users view the ACCPAC CRM through a browser. ACCPAC CRM takes care of all client and contact information whilst also providing the specific screens and functionality for the recruitment (search and select), marketing, business development and training.

The system allows the company to:

- 1) Maintain a single source of data for all company activities
- 2) Drive and report on Marketing Campaigns
- 3) Analyse Marketing Campaign Results and activity
- 4) Provide visibility of the sales pipeline across the company
- 5) Provide forecasting and analysis of business development activity
- 6) Provide visibility of all client activity in a single source

Reflection and the Next Stages

The introduction, implementation and go-live at Boxwood was by any standards a smooth process. David Cook puts this down to two things – technology choice and planning – “We put our own advice into good practice – we defined what we wanted and planned how to get to it. However, this could have been easily sent off course with the wrong software selection. ACCPAC has proven to be the perfect middle market solution for us – deep enough to match our unique processes, functional enough to deliver the tools we need to do better business, and straightforward enough to provide a timely, and cost-effective implementation process.”

The benefits already accrued have been considerable:

- 1) Informed sales force aware of all communications that have taken place with prospects and clients
- 2) Targeted marketing campaigns resulting in a more appropriate pipeline and better return on investment
- 3) Reduced response times for search & selection candidates
- 4) Improved customer service for training course delegates

David Cook comments, “**ACCPAC has already delivered fantastic results and we’re actively exploring where we can go in the future and how ACCPAC can help get us there.**”

About Boxwood

Boxwood Group’s strength is improving business performance by introducing and embedding operational excellence. Since it started in 1998, Boxwood Group has delivered over £900M worth of results to its client companies.

About ACCPAC

ACCPAC is a global provider of end-to-end business management applications for mid-size businesses. Look to ACCPAC 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, ACCPAC provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit www.accpac-europe.com.