



## Effective representation

**What makes an effectual  
executive committee member?**

### **Selling to strengths**

Create BD plans for  
introverts and extroverts

### **Upward view**

How non-executive directors  
can bring financial stability

### **Screening clients**

Questions to ask when  
taking on new clients

## CASE STUDY

# Sharing contacts

Group BD partner Andrew Dunn shares how he introduced a centralised CRM system at Begbies Traynor Group

## KEY TAKEAWAY POINTS

1

Implementing a firmwide client relationship management system is no walk in the park.

2

Dedicate time to assessing the firm's business requirements and configuring the platform.

3

You don't need a massive implementation team – we had just three people in the marketing department managing the entire project.

In a people-led business, the strength of contacts, relationships and networks play a huge role in business development, marketing and the overall growth of the organisation. However, the journey to achieving CRM success challenges many professional services firms.

Following my arrival at Begbies Traynor Group four years ago, it was clear that there was a desire from management to have a clear one-firm CRM system. As the firm had grown extensively through acquisition, many of our offices were operating on different independent technologies. It was obvious that a single platform would deliver substantial benefits in terms of client service levels and intelligence sharing.

I therefore made the implementation of a new centralised CRM platform my number one priority. As the first step, I recruited CRM expert James McEwen (who had worked with me previously on similar solution implementation projects) as senior business development manager.

### Selecting systems

You only get one chance to implement a major technology system and it is imperative to get it right first time. CRM implementations in professional services firms are notoriously prone to failure because many of the systems on the market are not fit for purpose for such businesses. Both James and I were acutely aware of this as we embarked on this project.

We needed a centralised CRM system – one that would integrate with our existing financial, email, HR and e-marketing platforms – so that there was a single data source of contacts and client records firmwide.

We weighed up a number of technical options – for example, a CRM module

that could be bolted onto our practice management system. This was the most cost-effective solution and professed to offer the same functionality as a best-of-breed CRM tool. But it was new to the market and hence unproven.

We also considered *Salesforce.com* – a great sales tool but, in our opinion, one that did not offer the same level of functionality as several other offerings that had been specifically developed for the professional services world.

We were very clear in our minds that, whatever product we selected, it would have to provide the capability to uncover the hidden links between contacts and obtain crucial relationship intelligence.

This train of thought led us to InterAction, LexisNexis' CRM solution, and one that both James and I had substantial experience of using. It is designed for professional services organisations and is now gaining a considerable share of the accountancy market. The system is easily customisable, which made it a very attractive option.

However, it was also the most expensive option of the three and we needed to make a very compelling case to justify its purchase to our firm's finance director (FD). I believe our confidence in the platform and prior experience in using it were the main reasons for successfully securing our FD's buy-in.

Often, when making technology purchases, it is easy to be swayed in favour of a less expensive option, but, if the solution is not right for the business, it is a false economy spawning many new problems for the organisation. It is a pitfall best avoided.

We were able to clearly communicate the risks, challenges and rewards of implementing the more expensive system.



**“There was a natural resistance on the part of some staff to share their data”**

This gave our FD confidence that the selection was well thought through and that it was an informed choice.

### **Cultural overhaul**

We spent six months assessing, defining and refining our unique business requirements to appropriately configure the new CRM software.

The logistics of transferring data to the new system from several disparate platforms across the firm's 40 offices was a major challenge. Aside from the technical issues involved in replacing numerous data sources with a single firmwide CRM system, there was a natural resistance on the part of some staff to share their data.

We managed to overcome these issues, among others, with a planned and targeted communications programme, which commenced months before the system roll out.

This 'winning the hearts and minds' campaign set out to pave the way for a cultural shift in the firm that was vital to a successful embedding of the new CRM system.

It is important not to make the implementation of a new CRM system an IT project – highlighting the benefits that technology can deliver to individuals in helping them to meet their professional and career goals is more impactful.

There is no magic bullet to secure new technology buy-in from over 600

staff – it requires patience, persistence and consistency of message. We devised a detailed and exhaustive internal communications campaign that touched every member of staff across our 40 offices.

We used a variety of tools from desk drops and posters to presentations and one-on-one meetings to:

- inform staff of the reasons for implementing a centralised CRM;
- engage them early on in the customisation of the tool;
- communicate the benefits of the new system to them; and
- demonstrate how it would contribute to the overall strategic goals of the firm.

## IMPLEMENTING A NEW CRM SYSTEM

- ✓ You only get one chance to implement a major technology application – get it right first time.
- ✓ Balance the cost of the system with its suitability for the organisation – don't be penny wise, pound foolish.
- ✓ Don't make it an IT project – instead, highlight how the technology can help individuals to meet their professional goals.
- ✓ Develop a solid internal PR campaign for centralising client relationship management.

This process of inclusion and engagement has been instrumental in making adoption of the centralised CRM system a success. The interactions were not just a one off: we undertook this level of communication and outreach for every phase of the implementation.

At any one point in time, different offices were in various phases of implementing the new system. So, we ran simultaneous campaigns to address the diverse communications requirements of different offices and departments.

We also conducted more than 90 one-hour group training sessions, in addition to numerous partner and individual employee meetings, all of which were delivered by the same person to ensure a consistent and enthusiastic message.

We also 'walked the floor' across the 40 offices, giving staff ample opportunity to ask questions and allay any issues or concerns they might have. This created a meaningful personal touch, which greatly helped in bringing everyone on board. Indeed, there was a buzz and excitement in the firm about the system and the cultural changes it would facilitate.

### Did it pay off?

Today, the CRM system is truly the centre of information for the entire firm. It holds our contacts database but also, crucially, provides insight into our collective network and an in-depth view of our sphere of influence.

The implementation has initiated a huge cultural shift in the way business is conducted at the firm. People across our offices see the value of CRM – on average, around 80 per cent of staff are actively using the system each month.

Perhaps one of the key reasons is that the solution is fully integrated with Microsoft Outlook – partners and fee earners access InterAction via their Outlook screens, eliminating the need to access a separate system every time they need information.

The CRM platform is now central to our business development and marketing function. We use it to track marketing activities, engagements and events, providing complete transparency of business development initiatives across the firm.

We are also able to simultaneously execute multiple campaigns that target different sectors and markets much more efficiently than before.

In fact, we are seeing a greater involvement from partners and fee earners in marketing-related activities

due to the increased visibility of such initiatives.

We have grown the marketing data pool for our key target sectors five-fold in the nine months since the platform has been live. The increased depth of intelligence we hold on our contacts means that our marketing messages and activities are more relevant to the customers and prospects we communicate with. Consequently, we have more than doubled our e-marketing opt-in list.

Teams across the organisation now have accurate knowledge of who within the firm has existing relationships with contacts, making further relationship-building easier with both contacts and colleagues within the firm. It has strengthened the link between teams, providing a simpler and more efficient method of communication.

CRM is now embedded as a discipline across all of our business processes. However, its implementation has been no walk in the park. It has demanded considerable planning, on-the-hoof problem solving and tenacity.

Looking back, the best thing we did is that we didn't position the new system as an IT project. From the word 'go', the focus was fairly and squarely on winning the hearts and minds of employees and demonstrating how CRM can facilitate best practice, to deliver tangible benefits to staff and the organisation at large. mp

ANDREW.DUNN@BEGBIES-TRAYNOR.COM

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