

# Grant Thornton Case Study

**Company:** Grant Thornton  
**Industry:** Accounting  
**Product:** Lexis® InterAction®

## Lexis® InterAction® Helps Grant Thornton Align Partner KPIs with Business Objectives

Grant Thornton UK LLP is a leading advisor to dynamic businesses and individuals, offering services including audit & assurance, business risk, corporate finance, forensic & investigation, information technology, sustainability and more. The organisation's sector expertise spans business support services, consumer markets, health services, energy and financial services through to not for profit, real estate and the public sector.

The firm has been using CRM solution Lexis® InterAction® for eight years and it is currently used across its 25 offices. *Eleanor Quilter, Senior Executive – CRM, Marketing & Business Development, at Grant Thornton UK LLP talks to LexisNexis Enterprise Solutions about the strategic value that CRM delivers to the firm.*

### As a longstanding user of InterAction, how has the solution's use evolved at Grant Thornton?

**Eleanor Quilter:** Looking back eight years, there is a world of a difference in how the solution is both perceived and currently used, compared to when it was first deployed in the business. Prior to InterAction, we were using a CRM contact database alongside several other databases for CRM and there was no consistency across our offices in the tools that were used. So initially, InterAction was used to manage contacts and for relationship management. It gave us excellent insight into the activities of individuals and organisations within our firm's collective network.

Subsequently, we also deployed the InterAction Opportunities module. It allowed us to adopt a structured approach to managing our sales pipeline. We have good visibility of the status of prospective business, but can also analyse our wins and loses – which strategies worked, which individuals/contacts played a key role in winning the business, the reasons for a piece of business not materialising and so on.

Today, however we use the solution much more strategically. Partner KPIs are aligned with the strategic objectives of the business and InterAction helps us monitor performance and progress.

### Please can you elaborate on how this works?

**Eleanor Quilter:** As a firm we have an ambitious growth strategy. Fee earners and partners work with KPIs that encourage certain behaviours and practices from a relationship management and business development standpoint to help the organisation achieve its strategic goals. Some examples of our KPIs include whether we are engaging frequently enough with prospects and if we are addressing the clients' broader agenda.

We have 200 partners in the organisation and each has a KPI report that they can access from our reporting programme that utilises data from InterAction. So anyone can go into the tool and see how they are performing against their KPIs. Fundamentally, these KPIs ensure 'relevance' and urge forward-thinking – why are certain activities being undertaken and are they directly contributing to the achievement of our strategy. This information is used for guidance at individual partner level and cumulatively at an office/practice/department and organisational level, clearly linking the impact of activities to quantifiable business objectives. This kind of data is powerful and serves as solid insight for strategy development and measurement on an ongoing basis.

### Is InterAction deployed as a stand-alone system?

**Eleanor Quilter:** InterAction is key to the firm – it is integrated with Microsoft Outlook, Companies House data and with our billing system. Ever since we have provided access to InterAction from Outlook, everyone who has used the integration has been very positive about their user experience. Usage of the system has increased as using CRM isn't a chore anymore – people don't need to leave their Outlook accounts to update InterAction, making using InterAction feel like part of their day-to-day activity. It's all about the integrity of data, the more accurate, complete and up-to-date it is, the more value it offers, which in turn further enhances and encourages usage. This integration with Outlook has played a big role in enabling us to continue embedding CRM as a discipline in the firm.

InterAction's integration with our billing system allows us to see the value of the work we are doing for individual clients and which team leads the client relationship. From there we can identify where other teams could usefully be introduced to clients, with a view to helping clients achieve their goals and objectives. We also use client data in InterAction to manage our client satisfaction programme.

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### Grant Thornton is already using CRM in a sophisticated manner. What are your future plans for InterAction?

**Eleanor Quilter:** CRM adoption isn't a one-off project. To derive maximum value from it, we know that we must improve on how we use the solution routinely to optimise the functionality InterAction offers and help ensure that the information in InterAction is fit for purpose. We will always consider new data integrations with InterAction to add value and enhance the information we already hold in InterAction. We also need to continually review the systems, processes and data we have in place to ensure that InterAction continues to help support the firm in achieving our strategic objectives.

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