Sage CRM | Customer Success Story

Challenge

Alliance & Leicester were using a number of disparate sales relationship systems that were unable to provide a true picture of the customer or history of communications. They also needed something to enable them to roll-out targeted marketing activities.

Solution

Sage CRM was chosen to connect the Commercial Finance division with the Business Banking division and to provide Alliance & Leicester with a 360 degree view of their customers and to allow them to conduct targeted marketing activities.

Results

With Sage CRM, Alliance & Leicester can now support its sales activities and it has enabled the company to cross-sell other financial products to customers. Marketing activity is now targeted and the ROI can be tracked and monitored closely. Customer issues can be dealt with effectively thanks to the central repository of customer information.

CUSTOMER:
Alliance & Leicester

INDUSTRY:
Financial Services

LOCATION:
UK & Ireland

SOLUTION:
Sage CRM

NO. OF USERS:
300

Alliance & Leicester can bank on success thanks to Sage CRM

Alliance & Leicester Commercial Bank had a number of 'Sales Relationship Management' systems which needed to be replaced, as they were not delivering a complete view of the customer across divisions. This meant that they were restricted in providing a "joined up" service to their customers, which had implications in terms of service delivery. It also affected the bottom line as any ability to cross-sell complementary products was being missed. In addition, the company was eager to implement a solution that would be good enough to support its marketing activities and to strengthen its sales environment.

Since implementing Sage CRM, Alliance & Leicester is successfully managing its customer relationships by capturing targeted information about new customers, expanding sales efforts with its existing customer base, and increasing sales revenues. Howard Worthington - Senior Manager, Database Development, was responsible for the implementation of Sage CRM commented "We have a mixture of business customers from a sole-trader up to PLCs; we needed a system that could provide information covering the depth and breadth of all sales relationships for every given company. A system that could work efficiently both in a call centre and field sales environment, Sage CRM has delivered on all these counts".

"We lacked a central system through which we could track all of our sales and opportunity information. Instead, we had two systems that didn't connect with one another. It was difficult for our employees to determine the exact or current status of our accounts, they could only see their slice of the business"

Howard Worthington Senior Manager, Database Development

The drivers for selecting Sage CRM

Alliance & Leicester had two existing contact management systems in place, which did not interact with each other. This prohibited them from delivering the highest level of service because customer information was not accessible through a single location. "We lacked a central system through which we could track all of our sales and opportunity information. Instead, we had two systems that didn't connect with one another. It was difficult for our employees to determine the exact or current status of our accounts, they could only see their slice of the business" explained Worthington.

Alliance & Leicester determined the need for a Customer Relationship Management System that would "join up" the organisation and provide employees with a full profile of the customers with which they dealt. The company carried out extensive desk research on upwards of 30 systems, before finally short-listing six customer relationship management systems. From there they carried out six in-depth interviews with key suppliers to ensure each of their business requirements were met. "Small systems got rejected due to lack of scalability and larger system either priced themselves out or were too complex for what we required", commented Worthington.

Alliance & Leicester Commercial Bank's key requirements for its new CRM solution were as follows:

• Replace existing legacy systems for two different business units; 'Commercial Finance' and the 'Business Banking'

• A centralised system, ensuring each business unit had the same overview of customer activity

• A flexible system, that was easily configurable and one that they could build on in the future

• An adaptable system that would fit with their existing database architecture

• A system that could address all key workflow process and key business requirements from each business unit

• A system that will ensure real-time access to the most up-to-date information

• A system robust enough to cater for a potential of 300 users – a direct sales team inbound and outbound, a customer service team and an extensive field sales team

• The ability to integrate with existing sales productivity tools, i.e. Microsoft Outlook™ Capability to integrate with the legacy mainframe systems within A&L Commercial Bank

Alliance & Leicester selected Sage CRM, as it was easy-to-use, intuitive and well designed. It found Sage CRM to be sufficiently flexible to automate its preferred business processes, and was built to work with its existing database architecture. Sage CRM offered advanced functionality, which was needed to run effective sales, marketing and customer care campaigns.

Sage CRM also provided configuration tools that allowed Alliance & Leicester to rapidly modify all aspects of the system. "Sage CRM's web-based architecture greatly reduces deployment and maintenance costs as we could deploy on a single server and then simply provide access through a standard web browser for all the users. In addition most of the configuration could be done using Sage CRM's intuitive and point and click configuration tools. We knew this would have terrific time and convenience benefits for us as the implementation progressed".

Another key determining factor in the selection process for Alliance & Leicester was the comprehensive Microsoft Outlook integration. Sage CRM has complete bi-directional synchronisation with Microsoft Outlook's functions. "This is an extremely compelling offering that, critically, is easy to navigate and the automated synching takes no time at all. We have also installed an SMS plug-in so that we can have immediate contact with our field sales staff. We mainly use the Outlook Integration feature for the replication of diaries: we are planning to auto-synch contact information in the future so that this information can be shared throughout the organisation."

Implementation

Implementation and configuration of the new application went smoothly across three phases. Replacing the system in the Commercial Finance division was the initial phase, which was piloted over a three-month phase. The infrastructure (database structure and size, processing requirements) was scaled for the full 300-seat system although using fewer users initially. This was done to provide efficiencies in the ultimate system. User acceptance testing of the mapping of business processes and general stress testing of the system took place through this successful phase.

After the Phase 1 system successfully went live, the second phase (involving the replacement of the system in Business Banking and the addition of the Outlook™ integration) was implemented. This was another successful 10 week process that had the additional complication of incorporating the field sales workers where the proof of the extensibility of the system was demonstrated. Commented Howard Worthington, “What was most pleasing was the growing acceptance of the system by the users. Mapping the technical aspects and configuring the system to match our requirements were challenging but we were always fairly certain we could accomplish what we wanted with the system. What is always less certain is whether the users will use it. With the combination of the innate usability of the system and its integration with Outlook™ we have found the feedback from users on the usability of the system to be a key factor in its success so far.”

Phase 3, which is ongoing at the time of printing, is to provide access to a number of data points that reside on mainframe systems around the Alliance & Leicester Commercial Bank Group inter-face, increasing the usefulness of the system for its users.

Benefits of Sage CRM to Alliance & Leicester

- Access to Information Across the Organisation - Alliance & Leicester now have a single view of all customer relationships with both Commercial Bank and Business Finance divisions. This information is used to support sales activity and in particular the cross-selling of products.
- Improved Targeting Marketing Campaigns - Inbound and outbound calls in response to marketing campaigns are now dealt with more effectively. Telemarketing calls are now tracked from initial contact to call-completion, ensuring every customer interaction can be monitored so that Alliance & Leicester can deliver superior customer service.
- Greater Call Centre Accuracy - Alliance & Leicester has a central repository for all customer data, enabling staff to resolve customer issues quickly and efficiently, reducing call times and increasing the efficiency of their call centre.
- Improved Ability to Serve Customers - More employees are empowered with key customer information to help them suggest products of potential interest or respond to enquiries.
- Gained Insight into Sales Performance - Alliance & Leicester can easily manage multiple accounts and opportunities: sophisticated workflow features provide automated sales processes to guide CSRs through proven selling methods.
- More Sales Closed - With streamlined business processes and efficiency improvements, Alliance & Leicester anticipates a significant increase in the number of closed sales.
- Better Lead Qualification - Leads are now qualified by turnover and industry size, ensuring the correct sales person deals with each enquiry. Automated escalation and reassignment of leads has ensured that opportunities are never lost.
- Detailed Opportunity Reporting - With point and click reporting allowing sales teams to instantly analyse their performance, Alliance & Leicester always have the real-time information they need to ensure potential deals are never lost.

Alliance & Leicester took an open-minded well-structured approach to the selection and implementation of Sage CRM. Crucial to the eventual success of the project was the pre-planning that went into it. They knew what functionality they wanted to build. They know what users they needed to grant access to and they knew from where those users would access the system, whether in the field or in-house. They knew the productivity tools they needed to integrate with in order to foster use of the system. With all of this in mind they selected enough technology to get them there. Sage CRM delivered on three critical areas: enough functionality to deliver the tools that would aid the productivity of the users: a delivery method (the web) that would allow access to all users rapidly and easily: configurable and flexibility that allowed A&L Commercial Bank to tailor the system rapidly to its specific needs and requirements.

About Sage CRM

Award-winning Sage CRM delivers full suite CRM (comprising sales, marketing and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships.

Thanks to its ERP integration capabilities, the Sage CRM front-office is powered by data from the back-office to give sales, marketing, customer service and other front-office staff a true 360 degree view of customers across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

TO LEARN MORE ABOUT SAGE CRM, PLEASE VISIT WWW.MARDA.CO.UK