



Business Link Hertfordshire puts customers first with Pythagoras

When Business Link Hertfordshire needed to undertake a major change management project, it turned to Pythagoras, the UK's leading Customer Relationship Management Consultancy.

Business Link Hertfordshire provides advice, consultancy, training courses and a range of business services designed to improve efficiency, motivate and engender success in SMEs within the county.

Critical changes and business building

Typically a business' involvement with Business Link Hertfordshire stretches over a number of years. Its status during this time is therefore subject to much change as the business develops from start up to well-established concern. At each stage of the process, different services are required which different teams within Business Link Hertfordshire provide.

Amanda Freeland, Senior Business Systems Manager, explained: "The difficulty we were facing was how to best *share* our customer knowledge across our business. Staff who were starting to come into contact with a customer needed to be able to easily access the entire account history and identify which other sections of the business had also dealt with them. A business might

come to us for information and market research on one occasion and then again at a later stage for training or help with investment plans. It was impossible to access from one system, which services had been used and the different future business development plans had been generated."

This co-ordination of effort and resources was important to Business Link Hertfordshire to ensure that it was always providing the best quality customer service. "For us it is all about the customer's relationship with us. Customers come to us for help and support and independent advice and over the course of a few interactions they come to trust us. We are not doing the very best job we can for them if several departments are overloading a small business with initiatives. Our CRM solution had to be sophisticated enough to help us understand and identify what our customers needed." explained Freeland.

One of the drivers behind the change to SalesLogix2000 was the fact that Business Link Hertfordshire was sharing a Unitrac CIS database and computer network with the Hertfordshire Training & Enterprise Council. With the demise of TECs in April 2001, it soon became apparent that Business Link Hertfordshire would need to create a separate network and took the opportunity to invest in a new CRM system

that would enhance its already excellent customer relationships.

As a result, Business Link Hertfordshire was faced with a huge challenge. At the same time as changing the CRM system, it also had to set up its own IT team, find a new IT manager, build a completely separate network, redevelop the website, replace the telephony switch and upgrade the accounting system all within a very short timeframe.

Solution searching

To find a suitable solution, Business Link Hertfordshire sought independent advice. Several suggestions were made including Pythagoras and SalesLogix2000.



SalesLOGIX®

Freeland explained: "From the recommendations, we then carried out detailed research on our own into how well established the companies were and how much expertise they had. It was very important that we chose a partner who could properly support our business during this major transition." Pythagoras was clearly one of the largest and most established SalesLogix2000 CRM system integrators and has been SalesLogix European Business Partner of the Year for the last three years."

She continued: "We also carried out product research to determine the product's flexibility and robustness, what the development and data integrity tools were like, how intuitive the system was, the security features that were offered and how the system would work with the company's remote offices and workers."

Freeland explained: " We looked very closely at the vendors, researched how many system users there were across the world and then compared a number of systems that closely fitted our needs feature for feature. In addition, we asked the system integrators to provide physical evidence of their expertise by asking them to arrange meetings for us with a number of their customers.

Business Link Hertfordshire had several other important solution requirements. In particular, the company wanted to reduce the amount of duplicated effort that was spent performing daily tasks. This was particularly evident with the co-ordination of the consultants' diaries. "We send consultants out to businesses all the time. Trying to keep up-to-date with their appointments and availability can be quite a paper chase. Previously, some of the consultants used Organiser but they all took paper diaries out in the field with them because the Organiser application was a network-only application. As a result, once a week the administrators had to rush around

grabbing diaries, comparing them with Organiser and creating a MS Word document that formed our company itinerary," explained Freeland.

The chosen solution also had to integrate smoothly with the website. Hertfordshire Business Link had developed an events bookings system for the old system and the continuity of this element was crucial. As a result, the short listed solutions were therefore interrogated to establish their booking system capabilities.

Programme challenges

Once the choice was made to go with Pythagoras and SalesLogix, project deadlines were tight. Running parallel to the Pythagoras scoping study, work was progressing apace splitting the network, building an IT team, developing the website and introducing the SunSystem accounting system.

A fully-rounded customer view

With the new system in place, Business Link Hertfordshire is experiencing numerous business benefits. Freeland explained: "Staff are finding things such as the query editor really useful and are able to generate relevant reports themselves which allows for greater self-sufficiency and autonomy. They are now able to access data they couldn't previously reach. The use of pick lists makes processes very straightforward. With our previous system you had to be something of an expert to know what you were doing. With SalesLogix2000 all the customer information is clearly displayed and easily navigable. We can see everything we need."

The sales opportunity functionality is also proving to be invaluable to the company. Freeland continued: "Some departments were more customer-focused and sales-oriented than others, some already carried out sales forecasting but others did very little. As a result, when they were asked for future income generation predictions they all had different forecasting



methods. Trying to get an overall picture of the future business turnover was very difficult. With SalesLogix2000, we now have a reliable and consistent forecasting mechanism which is key."

Additionally, Pythagoras integrated SalesLogix opportunity functionality with the SunSystems accounting application. Freeland explained: "When a training booking is made, the SalesLogix system automatically generates an invoice this is received into the SunSystem accounting application. This is a significant time-saving business process for us."

Freeland concluded: "With Pythagoras' help we have widened our view of our all-important customers. Staff are starting to say 'I can get what I need from this.' That wasn't something they could do with the old system. Thanks to SalesLogix2000 we now have an electronic information exchange that is open to the entire organisation. Using the system we can now build and sustain long-term customer relationships and ensure that we continue to put our customers first."