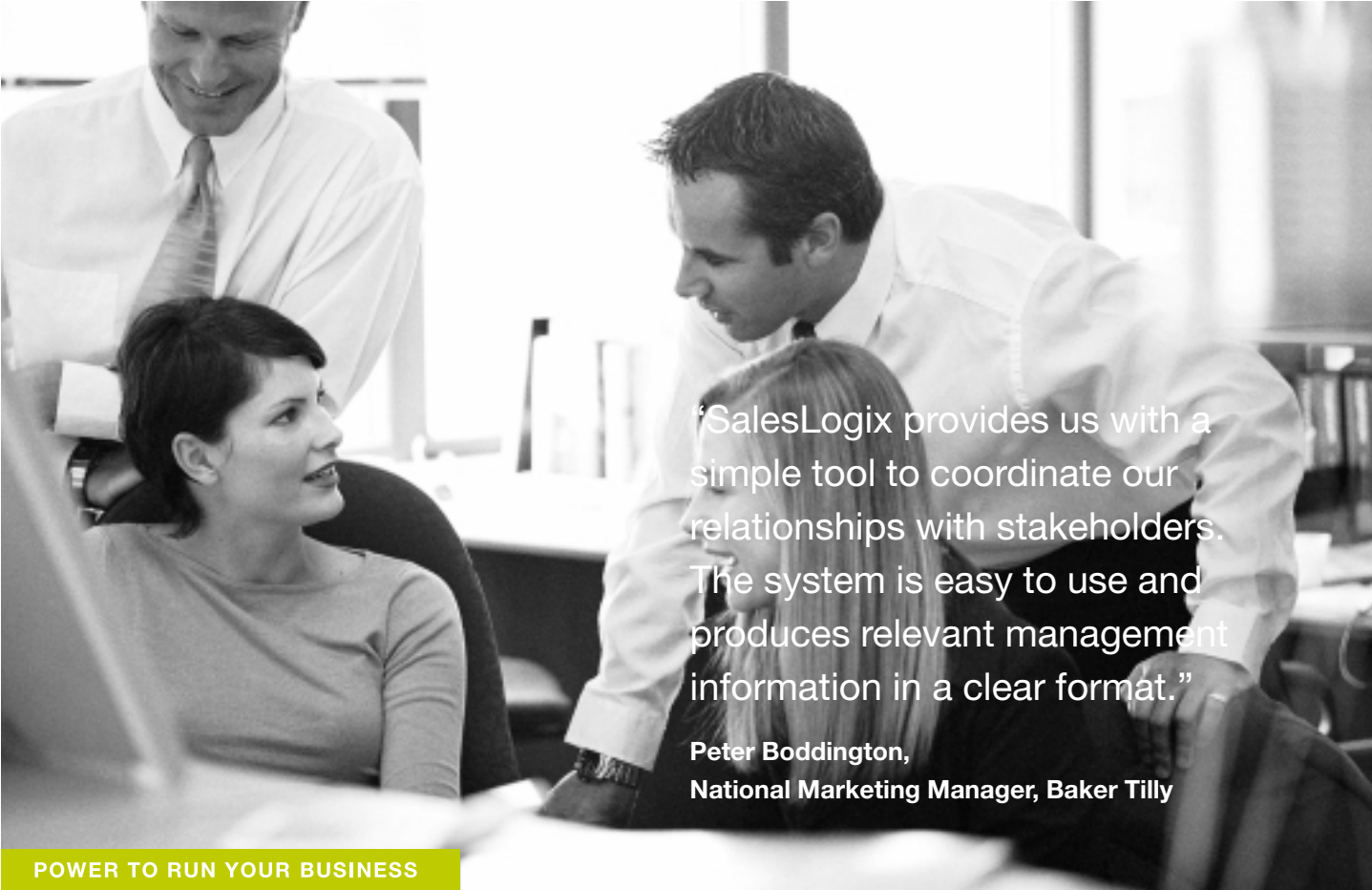


## Baker Tilly sharpens marketing with SalesLogix solution



“SalesLogix provides us with a simple tool to coordinate our relationships with stakeholders. The system is easy to use and produces relevant management information in a clear format.”

**Peter Boddington,**  
National Marketing Manager, Baker Tilly

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### Customer profile

Chartered accountants and business advisors Baker Tilly is the seventh largest firm of its kind in the UK.

The business primarily targets clients with turnovers of between £10m and £100m. Its areas of specialisation range from agriculture to media to social housing.

Services offered to UK customers include audit, personal and corporate tax, consultancy, corporate finance, financial services and business recovery.

Part of a global company, Baker Tilly in the UK has 260 partners and nearly 2,500 staff, with a turnover of £160m.

## The challenge

Back in late 2001, the firm recognised that it could be making better use of the client information it had accumulated. At that time, this information was spread across eight different databases, and held in a variety of formats, Word, Excel, and so on.

As Peter Boddington, Baker Tilly's National Marketing Manager, recalls, "There was a real issue with duplication. We have 32 offices nationwide, stretching from Edinburgh to Yeovil. Two or more offices could be keeping partial records of their contact with the same client. It was virtually impossible to get the complete picture of our relationship with the client; so it made sense to look at coordinating this information to create valuable intelligence that could be shared across the firm."

He adds, "A planned merger looked set to double the size of the problem."

## The solution

The search was on for a solution which would give Baker Tilly's Marketing teams a single, easily accessible database to manage customer contact records and marketing campaigns.

Peter explains why Baker Tilly chose Sage, in particular the SalesLogix solution, "We looked at three different vendors' solutions but the functionality of SalesLogix combined with its ease of use and flexibility swung the decision in its favour. SalesLogix offered a huge step up in maximising the value of our client data, without scaring our users.

### KEY ACHIEVEMENTS

- Eight fragmented sources of data replaced by a single, unified database, providing a shared view of clients nationwide across the firm
- Monitoring of clients' response to specific marketing programmes, so that future campaigns can be targeted
- Tighter management of lead tracking
- Valuable reserves of competitive intelligence built up

We did look at the ACT! Contact Manager from Sage but decided the SalesLogix customer relationship management solution would give us more power to drive our marketing forward."

There was another decision to be made: the choice of Sage Business Partner. Impressed by its reputation and experience in the professional services market, the firm selected e1 Business to customise SalesLogix.

Baker Tilly's confidence in its Sage Business Partner has proved well founded. Peter comments, "We've found that e1 Business listen carefully to how our business works, and have been able to replicate our processes in SalesLogix."

## Results

By March 2002, Baker Tilly was ready to start preparing the disparate marketing data for transfer onto SalesLogix. As Peter admits, "Sorting the data in over 2,000 client records and achieving the desired level of consistency was a real challenge. Once that task was completed in-house, we were able to move ahead quickly with customising the solution to our purposes, and training up our users."

Initially, seventy Baker Tilly staff from across the country received 'client server user' training, a number which has subsequently risen to eighty. After training by the Sage business partner, they were ready to go live with the solution in September 2002.

The main aim of the solution is to support its Marketing function. SalesLogix is used by the firm's Marketing assistants, executives and managers within the office to log and view clients' details, contact records, response to marketing campaigns and so on.

Campaigns can now be targeted. Clients' particular interests are recorded, so that they receive focused marketing messages. For example, they are sent invitations to the corporate events that reflect their interests. Clients' perception of the firm has been enhanced as Marketing activities are now better organised and coordinated.

The solution can track the impact of these marketing campaigns to help assess what activities bring best return on expense. Reports can be easily generated.

SalesLogix supports accurate lead tracking, too. Managers can view the status of a lead and track it to closure, collecting competitive data on the way. If the sales effort proves unsuccessful, this result, too, can be analysed and lessons learnt.

Peter points out that the support provided by SalesLogix extends beyond managing client relationships: "We aim to develop strong reciprocal partnerships with advisors such as banks and solicitors who are in a position to influence their clients. The solution helps us to manage these relationships effectively, too."

He sums up, "SalesLogix has exceeded our expectations. It provides us with a simple tool to coordinate our relationships with stakeholders. The system is simple and easy to use and produces relevant management information in a clear format. It's very robust in handling high numbers of users and is also very reliable – we don't lose valuable data. We're fully aware that even two years on there are still more features which we could be exploiting. It's doing a great job for us but there's scope to use it even more. We plan to ramp up our usage of the solution and capitalise further on our client data."