



Accountancy firm improves client service and recovers significant annual chargeable time with BlackBerry solution and mobile access to CRM

Since being founded in 1992, taylorcocks has grown to be one of the leading firms of chartered accountants and chartered tax advisers in the South of England, specialising in accountancy, tax and business advisory services. With six offices and 90 employees it serves over 1,200 clients ranging from large companies to owner-operated firms.

The Challenge

In the competitive field of professional services, taylorcocks prides itself on how closely it works with its clients. Not only is the firm staffed by experts with proven commercial experience, it strives to deliver the best possible client service by being responsive and proactive to client needs. Consequently, the firm's account managers spend a large portion of their time out of the office, working directly with clients or on in search of solutions to their challenges.

The firm manages client relationships using Sage SalesLogix CRM (Customer Relationship Management) system. "SalesLogix is central to our business. Everything to do with the client is done through the system," explains Simon Howell, a Client Relationship Director at taylorcocks. SalesLogix acts as a centralised reservoir of client data – giving staff access to an overview of every transaction for each client the business has. It also enables the firm to manage the frequency of contact between account managers and clients.

But mobile users didn't have access to the SalesLogix system when they were out of the office. They couldn't look up a client's phone number or email address, since they are housed in SalesLogix. Nor could they schedule meetings or add notes to the SalesLogix history. "When we were out of the office we were flying blind," says Howell. "We'd have to log in with our laptops at the end of the day and update the client file."

"The challenge has always been how to get our SalesLogix diary into a mobile device," says Chris Kyle, Operations Director at taylorcocks. "There are plenty of mobile devices that can cope with your Outlook email, but we don't use Outlook for our contacts or our calendars," adds Miles Auckland, a Client Relationship Director at taylorcocks. "Finding a solution that could let us use SalesLogix effectively on the move was absolutely key."

Benefits

Saves at least five hours a week in administrative tasks

Improved responsiveness and customer satisfaction

Increased personal productivity

Complete access to CRM system



The Solution

In 2009, Ian Cocks, co-founder and Managing Director of taylorcocks, attended an event hosted by his Sage SalesLogix Business Partner, QGate Software, at which he saw a demonstration of SalesLogix Mobile software running on a BlackBerry® smartphone. Kyle figured that if their CRM provider was using BlackBerry smartphones with SalesLogix, then a BlackBerry® solution would be the best bet for taylorcocks. Moreover, the ability to wipe data from a BlackBerry smartphone if it goes missing and to manage security policies remotely means the BlackBerry solution complies with taylorcocks's security requirements.

In late 2009, taylorcocks rolled out a BlackBerry solution comprised of a dozen BlackBerry smartphones running Sage SalesLogix Mobile coupled with BlackBerry® Enterprise Server for Microsoft® Exchange. The response from users was immediate. "If you stick a BlackBerry in a user's hand they'll come back two days later raving about it," says Kyle. "Most people can't see what could be done with a technology like BlackBerry until you put it in front of them. Come back a few days later and they'll tell you they can't live without it." The reasons for the rapid adoption of the BlackBerry solution can be seen in Howell's own experience: "I haven't needed to read the manual. I got the hang of it very quickly."

The Benefits

Today, just a few months after the deployment, taylorcocks credits the BlackBerry solution with SalesLogix as having completely transformed work in the field. For example, Auckland receives upwards of 120 emails a day and says, "waiting until the end of the day to go through them was a nightmare," not to mention not very good for customer service. Now he is able to manage his email throughout the day, answering client inquiries on the fly or forwarding them to colleagues for follow-up. He comments, "I know what's been dealt, I know what to react to" with the BlackBerry solution. An added bonus is that he now returns to the office after a day in the field with a "clean inbox."

Moreover, the BlackBerry solution has proven to be a time-saver, because all client-related activities out of the office are done via the BlackBerry smartphone and recorded directly in the SalesLogix system. As Howell explains, "as soon as I finish a call on my BlackBerry it prompts me to log it in SalesLogix." He finds it so practical that he now prefers to enter his meeting notes into SalesLogix on his BlackBerry smartphone rather than use his laptop. Auckland adds that when a client asks him during a meeting for information that he doesn't have, he can open a "ticket" on SalesLogix that is automatically sent to the right person for follow-up, and explains: "the client often has the response before I get back to the office." Howell and Auckland both estimate that the BlackBerry solution saves them at least an hour a day – the equivalent of over £1,000 in recovered chargeable time per user each week.

"The bottom line is that we're more responsive to, and more effective for, our clients," says Howell. "With the BlackBerry solution with SalesLogix our users have got their email, calendar and CRM on one device, which is just about everything they need to be effective when they're on the road," concludes Kyle.

www.blackberry.co.uk/casestudies

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Simon Howell
a Client Relationship Director
at taylorcocks

Sage is one of the world's leading suppliers of business management software with over 5.7 million customers worldwide. Sage SalesLogix is a leading CRM solution which enables businesses to acquire, retain, and develop customer relationships by increasing sales and marketing performance and maximising customer satisfaction and loyalty.