CASE STUDY

B2B. CRM Implementation
Client: International Management Consultancy

Client

Our Client is an international management consultancy, based in London and New York. It had grown historically as a result of referrals and Partners joining the Practice and bringing with them their own individual clients.

They had reached the stage in their development where the Partners were looking for a more centralised approach to new business activity and with it standardisation of a wide variety of systems and processes being used by individual Partners

Ambitious growth targets based around a more disciplined and centrally controlled new business approach had been set

Services

- **Summary**
  Ignite was asked to review current systems, processes and data sources being used across the Consultancy by individual Partners to execute and manage new business activity, recommend a strategy around a more centralised approach and the specification for a new CRM system to manage and delivery that strategy

- **Business Processes, Systems and Data**
  Interviews were conducted with all the Partners to audit their focus and activities in terms of new business, the approach being adopted and scale, what systems were being used to manage it and what data they held
  We also discussed with them their views about new business strategy and approach for the Consultancy overall
  As a result of the audit Ignite wrote
  - a new business strategy
  - a specification for a CRM system
  - a strategy and delivery plan to improve the prospect data being held in terms of the scope and completeness to fit the strategy
  - a lead generation strategic approach and delivery plan
  This was accepted by the Board

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- **CRM System**

  As a result of the requirements in the specification, Ignite recommended 3 potential CRM products and the specification was sent out to the Solution Partners of these selected CRM software providers

  Ignite managed an internal team to review presentations from the potential providers and oversaw the selection process

  Ignite then handed over the implementation to an internal team

- **Data**

  Ignite brought together prospect data from a variety of different internal systems. We then undertook de-duping, data cleansing and enhancement to improve the quality of the data being held.

  Ignite also undertook internet research and telephone work to improve the scope of prospect records being held in our client's chosen sectors

- **New Business Lead Generation**

  As a result of enhanced data in a centralised CRM system accessed by all in the Consultancy, the client was in a position to adopt the lead generation strategy recommended by ignite and delivery more targeted and successful campaigns internally

Outputs

- **New Business Strategy**

  Ignite provided the rationale for a new business strategy and approach to be adoped by the client

- **CRM**

  Ignite provided a requirements specification for a CRM system to replace a number of dis-jointed systems being used across the Consultancy and managed the client through the CRM selection process

- **Prospect Data and Lead Generation**

  Ignite used their database team, research team and telephone team to enhance and extend the prospect data and align it to the strategy and sectors receiving focus. This enabled the Consultancy to adopt Ignite's lead generation approach delivered by their internal marketing team

References available on request

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