CRM – not for the faint hearted

A partner in the London office of Grant Thornton met a former colleague on the train and discovered he had recently moved to another company. When she returned to the office she typed his new company details into the Firm's new CRM system, and discovered that a partner in the Glasgow already knew the company well. They are now working together to pitch for business with this company.

Beginnings

Last year Grant Thornton rolled out the InterAction CRM system across the firm and initially to 1,700 partners and staff, meeting the ambitious deadline of having all thirty UK offices up and running by Christmas. This huge leap forward will be followed during 2007 by a steady process of consolidation, driving up the quality of contact information and adding features such as email marketing and sales pipeline management.

The firm is already starting to reap the benefits of the InterAction project, and the system's relationship management and networking features – as illustrated in the story above – are beginning to establish the system as an essential business development tool.

The benefits of such a system were not always so clearly understood, as Suzy Goodwin, National Director of Marketing and Business Development recalls. "Initially some people regarded this as simply being a system for the Marketing department. It was only when partners saw the way InterAction would help with their daily lives, and how well it integrated with existing e-mail and contact systems, that they really put their weight behind the project."

The new system also offered the potential to consolidate all the firm's business contacts in a single repository, and in so doing, to support the firm's strategy of nationally integrated marketing campaigns. But as we shall see, getting from A to B – replacing existing systems, converting all sources of contact data, and training 1,700 people – proved to be a real challenge.

Project management

Right from the start the project was supported by the firm's senior management. As National Management Board member Malcolm Ward explained: "We didn't want this to be seen as either a Marketing or an IT project; we wanted to ensure the InterAction project was driven by the needs of the business."

This approach was mirrored in the management of the project itself. An internal project manager, Jessen Chen, was appointed to lead the project and ensure involvement of key members of the firm. Having already managed the firm's complex conversion to LLP status Jessen was well connected – and respected - within the firm.

The firm also appointed an external project manager – John Rogers – with the brief of co-ordinating project resources and ensuring completion on time and budget. Whilst both Marketing and IT were kept closely involved, they only had to consider the areas which were relevant to them. At a time when both departments were involved in major change programmes, this ensured a consistent focus on the CRM project.

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Workshops

The InterAction project kicked off in late 2005 with workshops in three key offices. These were aimed at understanding how partners used their network of contacts – clients, intermediaries and prospects – to develop new business opportunities.

The workshops were crucial in providing the team with an understanding of how contact data was used, where it was located, and the difficulties that would be involved in its consolidation into the new system.

Core database

As a result of this research, the team decided to take a radical approach towards the challenge of creating the firm's new contacts database. Instead of the traditional approach – taking all of the firm's contact data and cleansing it – they created a core database consisting of reliable information. This eventually came to consist of some six thousand organisations: principal clients and intermediaries together with key targets.

Company names were sent to an external agency which created contact information from reliable external sources. As Jim Lenox, manager of the database team said, "You wouldn't believe how many ways people write 'Royal Bank of Scotland'". When new contacts were entered we'd simply verify them against organisational information we knew was correct. This ensured we could keep information accurate during a very rapid rollout."

Attractive design

Many people are apprehensive about getting fully involved in using CRM. Whilst some will take the plunge immediately, others will want to start by dipping their toe in the water. So as well as ensuring the design met the basic requirements of the business, the team added features which would have a more instant appeal.

Secretaries' eyes lit up when they saw integration of contact data from within Word and printing of summary contact reports and maps for their partners.

Partners became similarly interested when they were provided with instant access to summary billing information and external financial reports from within InterAction.

Communications

From the start, emphasis was placed on the need for communication. In organisations that are already saturated with information this can be hard to achieve, so the team largely avoided conventional methods. Fast-paced videos were shown at staff conferences to create an initial interest and awareness in the project, whilst partners were treated to a light-hearted play that contrasted the benefits of CRM with the inefficiency of their current methods. Six months later most partners could still recall this session, demonstrating its effectiveness.

The other really effective approach was local office visits. These paid dividends in terms of enthusiasm and involvement, providing an opportunity to sell the benefits of CRM to the people who would have to use it. In particular, secretaries were shown how active management of contact information could make their lives easier – and in doing so, greatly improve the overall quality of the database.

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Implementation

How long should it take to install a new system? In the end we settled on two months to pilot the system in two separate offices followed by a four-month intensive period of implementation. By Christmas the team was exhausted – but in a remarkably short space of time the entire firm had access to the new system.

The twin-pilot approach paid huge dividends. The team learned the most effective way of managing the raft of tasks associated with converting each office: training personnel, installing software, and converting data. And it was also able to standardise this approach so that thirty offices could be converted in the space of fifteen weeks.

Stage two

The new CRM system was fully implemented by the end of December. However this was not the end of the project, only the end of the first phase. As soon as InterAction became established as a core business system demands on the team increased. Increased interest in the system rapidly led to an increase in demand for data cleansing, training and requests for design changes. Installing CRM is not the end of the project, merely the end of the first phase of work. This year will see the consolidation of InterAction as a key business development system, an important project in itself.

Conclusion

There are many factors to be considered if a CRM project is to be successful. Perhaps the most important of all was the emphasis on constant communication, in order to create an eagerness to embrace the new system. Or in the words of the old saying, “You can lead a horse to water ……”

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