

Since it was formed in 1992, taylorcocks has grown to be one of the leading firms of chartered accountants and chartered tax advisers in the south of England. The firm specialises in accountancy, tax and business advisory services.

Customer profile

Operating out of ten offices and with 100 employees, taylorcocks serves a client base of over 1,200 organisations, ranging from large companies to owner-operated firms and not-for-profits, across a wide range of industries.

The challenge

In the drive to offer outstanding service, taylorcocks has built a team of experts with proven commercial experience, who are backed by the systems and support necessary to respond quickly and professionally to clients' requirements. Until 2003, the firm depended heavily on a mix of Microsoft Office tools to store information on clients and to schedule tasks and appointments.

Simon Howell, Client Relationship Director at taylorcocks, explains, "At the time, we were quite advanced for an accountancy firm in the breadth of data we collected on our customers, but we recognised that our way of managing this data could lead to fragmentation. We sought a relationship management system to help us build a unified, shared view of our clients and keep them consistently at the centre of everything we do."

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Simon Howell, Client Relationship Director, taylorcocks

The solution

taylorcocks reviewed the technology available on the market. After careful deliberation, the firm selected leading CRM solution Sage SalesLogix.

Hampshire-based Sage Business Partner QGate Software provided expert support in implementing the solution and has continued to work with the firm to this day. Chris Kyle, Operations Director at taylorcocks, acknowledges their long-term support, saying, "They are always focused on doing what is right for our business, rather than the hard sell."

The benefits

The high expectations which taylorcocks had in purchasing Sage SalesLogix have proved well founded. Seven years on, the firm still manages all its client relationships through the solution. It provides comprehensive support across the business to build strong, mutually beneficial relationships.

"Sage SalesLogix is absolutely central to our business," explains Simon Howell. "Everything connected with our clients is done through the system. It stores all the information we acquire, providing not just contact details but the whole picture on our interactions with clients – phone calls, correspondence, the revenue they bring each month through direct debits, and so on."

The solution acts as a centralised reservoir of client data, with staff having secure access to an overview of the client's history with the firm. This helps in providing responsive service; if an account manager is not available to take a client's call, another member of the team is equipped with the necessary information to respond instead.

Sage SalesLogix also enables the firm to manage the frequency of contact between account managers and clients, to ensure that the client relationship receives the appropriate level of care. Senior and department managers have ready access to information on the status of their team's workload. Simon notes, "I can view work in progress by time and task and monitor the pipeline to check we are deploying valuable resources effectively and to plan for future commitments."

He adds that Sage SalesLogix supports the end-to-end development of the relationship: "Sage SalesLogix is instrumental in helping us to manage the evolution of business accounts and contacts from the initial engagement, all the way through the relationship management process to the closure of any business. We run marketing campaigns and manage prospective clients through it, to ensure that no step is overlooked."

Michael Lonnon, who heads up the marketing department, agrees, saying, "Although I came to taylorcocks from a large technology company, we didn't have the same level of understanding or quality of customer relationship management, and I've been extremely impressed by the support Sage SalesLogix offers on the marketing front."

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Michael Lonnon, Head of Marketing, taylorcocks

"When I log on in a morning, I open Microsoft Outlook and Sage SalesLogix - that's all I need to do my job. We take Sage SalesLogix so much for granted, as simply an integral part of the way we work, that it's quite difficult to remember how we functioned before its implementation."

Simon Howell, Client Relationship Director, taylorcocks

Sage SalesLogix allows the marketing team to be much more targeted in understanding prospects and clients, and their motivations. The audience for a campaign can be segmented by size of company and sector, or for individuals, profiled by age and personal circumstances. So, for example, the team might identify business owner-managers approaching retirement, looking for help with succession planning.

Michael comments, "It's very powerful stuff, and having information of this level at your fingertips is gold dust for a marketer. The last thing we want is to spam our database. Sage SalesLogix helps us to avoid the risk of over-communicating by coordinating our campaigns, targeting with relevant messaging, and monitoring the response."

The solution has continued to evolve over time to align with changing business needs and is regularly refreshed with new technology. The firm's account managers spend a large portion of their time out of the office, working directly with

clients or in search of solutions to their challenges. QGate Software introduced taylorcocks to the opportunities offered by Sage SalesLogix Mobile software to give staff secure access to email, calendar and CRM while on the move, through a single device, the BlackBerry® smartphone.

Chris Kyle observes, "We trust QGate's judgement implicitly. We figured that if they were using the solution themselves, it definitely deserved a closer look."

QGate Software set up the mobile solution for taylorcocks in 2009. Since then, time has been saved on client-related activities out of the office as they are done via the BlackBerry® smartphone and recorded directly in the Sage SalesLogix system. Customer service is also further strengthened: if a client requests information during a meeting, a 'ticket' can be opened on Sage SalesLogix and will be automatically sent to the right person for action.

The future

QGate Software is currently integrating the firm's telephony infrastructure with Sage SalesLogix. taylorcocks is looking forward to the benefits this will bring in terms of improved productivity and enhanced customer service. Staff will be able to identify callers and instantly retrieve their contact and account data in Sage SalesLogix, while outbound calls can be made quickly and accurately. Calls can be associated with marketing campaigns, to support effective evaluation and management. Being able to record call statistics and associated opportunity data will also contribute to improved business intelligence reporting.

The firm continues to work closely with QGate Software. Chris Kyle sums up the importance of the relationship, "We not only value their technical expertise but recognise the long-term contribution they have made to our success."

Solution overview

- A centralised, unified source of client and business data
- Support to deliver the personalised service that fosters client loyalty
- A solution that has aligned with business objectives over many years
- Ability to stay ahead of the competition by incorporating new technology
- Excellent, long-term support from trusted Sage Business Partner QGate Software



For more information call **0845 111 99 88**
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