

Sage CRM | Customer Success Story

Challenge

Thomson Financial's Australian operations realised that they needed a solution that would help them better manage their workflow and to increase their ability to service their clients. They also needed a solution that would provide them with comprehensive reporting information.

Solution

Sage CRM was chosen for its powerful workflow engine and web services interface. Users found the system easy-to-use and Thomson Financial was up and running with Sage CRM quickly.

Results

Sage CRM has allowed Thomson Financial to develop an application that is closely aligned with the business processes they wanted to automate, as well as providing strong integration capability and depth of functionality. Sage CRM has allowed them to re-structure the business to achieve greater client focus and offer superior levels of customer support.

CUSTOMER:

Thomson Financial

INDUSTRY:

Media and Communications

SOLUTION:

Sage CRM

LOCATION:

Australia

NO. OF USERS:

24

Thomson Financial improves client contact with Sage CRM

Background

Thomson Financial is the world's leading provider of corporate communications webcasts, delivering over 25,000 webcasts annually via its global webcasting infrastructure. Thomson Financial Corporate Services is Australasia's leading webcast services provider, with over 120 major corporate clients using Thomson Financial exclusively for webcast services.

Part of Thomson Financial's success is attributed to the attention paid to developing maximum levels of redundancy for both live and archived webcast services. Thomson Financial's Streaming Operations Centre ("SOC") is located at their regional head office in Pyrmont, Sydney. The SOC is the world's largest and most technologically advanced live Internet-streaming broadcast facility.

The need for change

Growing through acquisition, from a small business to a large corporation, the business needed to grow its CRM capabilities from manual processes to a large, automated database solution. Finding a compatible CRM system was a necessary step in assisting the business to manage its ever-growing client base.

Richard Avery, Australasian General Manager – Production, comments: "Although clients have a designated Events Co-ordinator, event information can feed through a number of different staff members. We needed one central database to store it all".

Thomson Financial was also looking for a better range of reporting capabilities that would allow it to:

- Forecast peak periods, so resources could be allocated and aligned properly to meet the extra demand.
- Share all relevant customer information, by maintaining a central database accessible to all staff.

Why Sage CRM?

A number of vendors were considered, but most were eliminated early in the selection process. The workflow capabilities of Sage CRM certainly put it ahead of the rest. Avery says: "Discussions took place with several manufacturers, but they were qualified out quite early due to poor fit. We had established through our own research that Sage was going to be the best provider for our specific needs".

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– Production, Thomson Financial

The Implementation

Thomson Financial has rolled out 24 licences in its Sydney Office, which incorporates the main facility for establishing and streaming the webcasts. Initially the system was trialled and assessed with two super-users in the team. After the initial assessment, the system was extended to various other key stakeholders in the Thomson team.

The biggest challenge for the project was that there was very little time in which to train staff before a busy period occurred. Avery comments: "The business partner, Acuere, helped us greatly to manage the process through effective training and support."

The most challenging technical aspect of the implementation involved the creation of an effective user interface to match the unique workflows of Thomson's business processes. "Acuere provided us with the support we needed, by allowing us constant input into the creation process. There was also a high level of user-acceptance testing."

Sage CRM comes with a powerful workflow engine, built on open architecture, with a web services interface. It allowed Thomson Financial, with Acuere's help, to develop an application that closely aligned with the business processes they wanted to automate, as well as providing strong integration capability and depth of functionality.

Benefits to the business and ROI

There was a range of objectives the new Sage CRM solution set out to achieve, including:

- Create a centralised tool for all users, to ensure better management and information flow about current and future events.
- To further improve the scheduling of resources across multiple projects.
- Alerts to ensure the timely delivery of mission-critical tasks.
- Accurate and readily available reporting across multiple projects.

According to Avery, Sage CRM has allowed them to re-structure the business to achieve greater client focus and offer superior levels of customer support. As the product was customised for Thomson Financial's use, there are a number of features that have further increased its operating efficiency:

- Automatic reporting;
- Real-time data;
- Each client is assigned a contact person to assist in service delivery;
- Reduced risk of data duplication.

About Sage CRM

Award-winning Sage CRM delivers full suite CRM (comprising sales, marketing and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships.

Thanks to its ERP integration capabilities, the Sage CRM front-office is powered by data from the back-office to give sales, marketing, customer service and other front-office staff a true 360 degree view of customers across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

The Sage Difference

- The leading supplier of SMB business applications in the world*
- The leading supplier of CRM solutions to SMB organisations
- Over 6.1 million customers
- Over 13,100 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 28 years experience

*Source: AMR Research, 2009, The Global Enterprise Application Market

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