

TAILORED CRM SOLUTIONS

TRANSFORMING CLIENT COLLABORATION & DECISION MAKING



CHALLENGE

Our client, an international sports organisation, had identified the need for a unified CRM solution, with multiple teams requesting a solution and other teams having issues around the management of customer data. The aim was to avoid fragmented systems with duplicated customer information and find a solution that could integrate seamlessly across the organisation in line with their organisational strategy.

PROVEN PERFORMANCE

75+ SUCCESSFUL PROJECTS
15+ CLIENT ACCOUNTS
40+ YEARS EXPERIENCE

PROCESS

We began with bite-sized consultancy to assess the situation and make recommendations, with key findings including:

- Team Needs: Identified which teams required a CRM and their specific needs.
- Data Locations: Determined where existing data was stored and how it was used.
- Current Issues: Highlighted challenges like poor data security, reliance on paper processes hindering decision-making and limiting digital engagement.

Our advice was to implement a single technical solution supporting multiple CRMs with shared data that could integrate with external partner portals. We recommended an iterative approach for staged delivery and a requirements-led procurement process to select the best-fit solution.

OUTCOME

We provided a project manager and analyst to:

- Identify Requirements: Worked with all relevant teams to outline high-level requirements for procurement.
- Guide Procurement: Used our framework to identify the best-fit solution and implementation partners.
- Plan Implementation: Developed a phased plan, including the addition of a crucial customer engagement portal in the first implementation.

After selecting the solution, the client assembled a 20-strong project team, led by our project manager, to supplement internal resources. We worked closely with the client's business analyst, product owner, team subject matter experts, as well as the third-party solution provider and implementation partners.

To help foster the new relationships with the third party partners, we provided coaching and support to the project team in their transition to agile methodologies, a new approach for the team.

Implementing the unified CRM solution significantly increased security, enhanced data quality, and drove engagement with external partners. For the first time, our client was equipped with the capability to collect and analyse data effectively, enabling them to target strategic support where it would have the greatest impact. The system provided a 'one stop shop' for all information and interactions, supporting global engagement with partners, eliminating the need to search multiple systems, saving time, and increasing efficiency and accuracy.

BENEFITS

- Improved data collection and comparison, enabling the organisation to strategically target support where it would have the most impact.
- Enhanced data security and quality.
- Created a "one-stop shop" for all information and interactions, eliminating the need to search across multiple systems.
- Saved time and improved efficiency and accuracy in data handling.
- Increased engagement with external partners across the globe.