

Success Story

WORKBOOKS HAS REALLY HELPED TO STREAMLINE OUR BUSINESS PROCESSES: CAPITAL ACCESS GROUP

After implementing Workbooks CRM, Capital Access Group were able to increase customer intelligence, begin marketing to existing clients & replace cumbersome spreadsheets



“OUT OF ALL THE CRM PROVIDERS WE LOOKED AT, WORKBOOKS REALLY TOOK THE TIME TO GET TO KNOW US.”

John Gillespie - Financial Controller at Capital Access Group

INTRO

Founded in 1999, Capital Access Group (previously known as Broker Profile) has established itself as the leading Investor Relations Consultancy focusing primarily on Private Client Fund Managers and Stockbrokers in the UK.

Based in the heart of the city, Capital Access Group is now a 22-person company with a large and diverse portfolio of clients that span across many sectors, many of which are listed in the FTSE 100 and FTSE 250.



EASE OF USE & FLEXIBILITY



STREAMLINE PROCESSES



ABILITY TO MARKET TO EXISTING CUSTOMERS

INCOMPLETE DATA

A key element of Capital Access Group's business is to coordinate the attendance of brokers at client investor briefings and road shows. Across the business, Capital Access Group were using a number of applications, including Microsoft Outlook and Excel, to segment their data and to track interactions between their clients and potential investors.

Capital Access Group found that using many different applications was resulting in incomplete and duplicate data being stored, making it difficult to effectively track client interaction and to monitor the history of the client/investor relationship.

One area that needed addressing was the ability to market to their prospective clients and easily capture responses from them. Under their existing systems, no single application held all the data, which made it difficult to segment information easily, and made targeted marketing campaigns almost impossible.

"ALTHOUGH SPREADSHEETS SEEMED ADEQUATE AT FIRST, AS OUR BUSINESS GREW, IT BECAME APPARENT THAT WE NEEDED A MORE CENTRALISED SYSTEM TO STREAMLINE OUR PROCESSES."

John Gillespie - Financial Controller at Broker Profile

USING CRM TO STREAMLINE BUSINESS PROCESSES

Capital Access Group recognised that to remain leaders in their field, they needed a centralised CRM system. They set out to identify a solution that not only met their requirements from a functionality perspective, but one that was easy-to-use, and would be quickly adopted by the whole team.

Capital Access Group considered an array of CRM suppliers, including Salesforce.com, ProspectSoft, Sage CRM and Microsoft Dynamics.

INTUITIVE SYSTEM

"Seeing Workbooks in action convinced us it was the right way forward" explained Robert Irvin, Head of Client Management. "Not only does the system enable us to effectively filter our data, based on our own custom fields allowing all interactions with clients to be recorded, but the 'windows-like' feel to the system, makes it so intuitive."

From the very beginning, Capital Access Group was impressed with Workbooks' consultative approach.

"Out of all the CRM providers we looked at, Workbooks really took the time to get to know us and to get to know the business and what we wanted to achieve." said John.

TAILORED SOLUTION

The Workbooks Service Delivery team worked closely with Capital Access Group to identify their existing processes and to agree what they wanted to achieve out of the system.

This process enabled Workbooks to fully customise the system to Capital Access Group's individual needs, making it even easier to use and hence accelerating user adoption.

Through the use of custom fields, Workbooks were able to map their CRM solution to Capital Access Group's business, rather than Capital Access Group having to change their core processes to fit with the system.

"WE'RE EXTREMELY HAPPY WITH THE PROGRESS WE'VE MADE SO FAR. HAVING ALL OUR DATA IN ONE CENTRALISED SYSTEM HAS REALLY HELPED TO STREAMLINE OUR BUSINESS PROCESSES. I'M CONFIDENT THAT WORKBOOKS WILL CONTINUE TO DELIVER EXCEPTIONAL RESULTS FOR US."

John Gillespie - Financial Controller at Broker Profile

About

INDUSTRY

Finance

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

March 2010

TECHNOLOGY

- Workbooks CRM

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