

*Case Study*

# XPS PENSION GROUP

Improved efficiencies across  
their entire network



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*Charlotte West*

XPS PENSIONS GROUP

## WHO IS *XPS Pensions Group?*

XPS Pensions Group is the largest pure pensions consultancy in the UK. It employs more than 1,200 people in locations across the UK, advising more than 1,200 pension schemes and administering pensions for around 920,000 members.

The XPS Group of today was created through the merger of two firms in January 2018. Both companies had been in business for more than three decades and both employed around 500 people. Prior to the merger XPS had been using a CRM system; initially one built in-house, then a cloud-based solution from Salesforce.

# UNWIELDY CRM

The decision to adopt a new CRM solution was prompted largely by frustration with the incumbent system. It was too unwieldy and difficult to tailor to XPS Group's specific requirements.

It was focused purely on sales relationships, not marketing. And, when the XPS team needed support, they found it hard to access and not particularly effective. All of this added up to a poor return on the company's CRM investment.



The service and support shortcomings of our previous CRM system were particularly frustrating. If we had an issue we'd have to email the support team and wait for a response. Because they were based on the US west coast, we'd usually get a reply in the middle of the night, which really slowed things down."

*Charlotte West*  
XPS PENSIONS GROUP

"When you did eventually get through to someone on the phone, because they're support function was overseas, it often resulted in difficult conversations where no one really understood what was being said. This made it incredibly challenging to move things forward."

These frustrations helped to set some of the principal requirements for the new system: it had to be highly customisable in-house, offer the option of linking sales and marketing functions, UK-based, and it had to offer good, reliable support.

From a commercial standpoint, XPS wanted its new CRM solution to help colleagues be more effective in their business development roles. It wanted the quality of service its client services team provided to improve – which would lead to better client retention. And it wanted to improve efficiency across the group by making it easier to find the information people needed to do their jobs.

The search for such a system began online, then continued through more detailed face-to-face conversations, and eventually led to Workbooks, which XPS Group adopted in 2016.



# HITCH-FREE IMPLEMENTATION

The support received on implementation made for a refreshing change, according to Charlotte West.

She says: "The Workbooks team offered suggestions for how we could achieve the results we were looking for, then together we tested and reviewed these processes to ensure we had the best solution in place for each requirement. It soon became obvious that this was a very different type of relationship."

"During a more recent project to merge two data bases, working closely with Workbooks, over the course of several meetings, we discussed in detail what we needed from the system and we worked together to complete the process – which is something we just couldn't have done without Workbooks' support."

Where the old CRM system was used almost exclusively for sales prospecting, Workbooks has helped XPS Group to embrace the wider functionality of its solution, from improving the customer experience to reducing operational costs and tracking key business information.



We chose Workbooks as it was able to provide the CRM best suited to our needs – and we're very glad we did. It's a highly customisable product and the Workbooks team provide excellent support when it's required. It's made a real difference to our sales and marketing, and our reporting. It has generated significant revenue and enabled us to run our business more efficiently."

*Charlotte West*  
XPS PENSIONS GROUP

Workbooks has helped to integrate XPS Group's marketing activities much more effectively with sales, as Charlotte explains. She says: "Now we're rolling out Workbooks for use on the client side of the business so we can record what our lead consultants are talking to clients about. So, for instance, we might have 15 services we offer to clients; we want to know exactly where our consultants are in their conversations about each service for each client."

"Workbooks gives us a clear view of all the touch points with all our stakeholders through various campaigns, events and online through our website. That's something we've not been able to do before.

Workbooks has also made it much easier for XPS to produce reports that track key KPIs, which are then easily reportable to the XPS Group board.

XPS recently extended their capabilities with Workbooks by adding single sign on and SheetView functionality - Single sign on ensure that all users can be created and provisioned within their Microsoft Environment for internal services (Outlook etc.) and Workbooks simultaneously.

Workbooks SheetView has enabled the teams to update multiple records at once and generally makes light of database tasks, making working with data more accessible and increasing user adoption.



# LOOKING AHEAD

The rollout of Workbooks across the XPS Group continues.

As the system moves into new parts of the business, it's crucial that new users understand its potential and know how to use it. Workbooks is working with XPS Group on communication and engagement, including promotional videos and how-to user guides.

Charlotte says: "As we reach more and more users in the business, we confidently expect the improvement on processes, sharing information and the integration with Outlook to have a measurable impact on our bottom line."

## SUMMARY

XPS Pensions Group, the largest pure pensions consultancy in the UK, adopted Workbooks CRM to replace Salesforce.

XPS was looking for a system that offered more flexibility and customisation – and whoever provided it had to offer top-class customer service.

After a hassle-free implementation, Workbooks soon enabled XPS to integrate its sales and marketing functions more effectively, which helped to generate new revenue. Workbooks has also helped make significant efficiencies in the way it runs its business.

**Overall, XPS Group estimates that the Workbooks CRM has generated a high number of revenue opportunities thanks to its more effective sales and marketing. And by streamlining business processes and improving efficiency, it's enabled cost savings.**

## ABOUT

### INDUSTRY

Pension Consulting

### NUMBER OF EMPLOYEES

1200+

### IMPLEMENTATION DATE

August 2016

### TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Business Pro
- Workbooks Exchange Server
- Workbooks Events Module
- Workbooks SheetView
- Workbooks Single Sign On
- Spotler Suite