

Case Study

“I have used CRM systems before but with ProspectSoft CRM, my call rate has increased by 60% and my appointment rate has dramatically improved”

Haines Watts Telemarketing Executive Susanne Akers



Haines Watts is a national group of accountants, consisting of more than 40 independently managed offices nationwide. They are one of the top 15 Chartered Accountants in the UK.

Haines Watts' mission is to provide their clients with high-value services and advice, ensuring the welfare of their businesses and private affairs.

Key Objectives

The Haines Watts marketing team has long tried to improve their information flow and analysis, telesales, telemarketing and marketing efficiency. The marketing personnel were charged with generating leads for three offices.

The flexibility of independent practices brings significant benefits to Haines Watts' end customers, but makes it difficult for the marketing team to monitor efficiency and track the progress of leads from each of the offices.

Solution

After carefully considering several CRM solutions, Haines Watts selected ProspectSoft CRM, provided by Microtrading Ltd.

Microtrading has more than 25 years experience in the competitive IT solutions marketplace and are long-standing ProspectSoft CRM Gold Partners

Benefits

Since implementing ProspectSoft CRM in 2005, Haines Watts has greatly enhanced their business management and have considerably improved 4 key business areas:

1. Information flow

Information flow and outdated systems meant that detailed information on many customers and potential business was being lost. Leads were being poorly managed or forgotten. *“ProspectSoft CRM has shown that you can now track the leads easily and follow them up promptly and accurately. Work efficiency and productivity has greatly increased.”* Samantha Davies, Marketing Executive

2. Information analysis

In the past, time was spent preparing reports by hand, which are now easily and accurately created at the push of a button. Production of bespoke reports allows the marketing team to receive exactly the information they need. Samantha explains, *“Improving and automating the reporting possibilities was a key step forward for us. I definitely feel that many opportunities have been missed by not using ProspectSoft CRM previously.”*

3. Marketing

The previous database system, whilst great for the accountants, had little provision for marketing. It was impossible to easily alter and clean the data. Searching for specific records was time consuming, manual call list production was inefficient, campaigns were

difficult to follow up effectively and potential leads were lost. *“We are doing marketing for the three sites and ProspectSoft CRM provides us with full visibility. We can be a lot more creative now and can manage all sorts of campaigns and monitor in real-time how successful our activities are.”* Samantha Davies, Marketing Executive

4. Telesales and telemarketing

Using the replicated data from all three sites, the marketing team can create easy-to-follow to-do lists to assist with telemarketing.

Next Steps

- Campaign Manager Module to further increase the efficiency of marketing campaigns, and more reporting, are future considerations.
- Other independent offices are investigating ProspectSoft CRM

Key facts

- Industry: Chartered Accountants
- No. of staff: 70 across 3 offices
- No. previous CRM system

CRM System Details

- No. of Sites: 3
- No. of Network Users: 9
- No. of Modules: 5
- Installation began in January 2005

Key Features

- **Configurable** for many sizes and types of organisation with multiple functional modules
- **Fully scalable** from entry-level to enterprise-wide solution
- Sales force, marketing and field service **automation**, all with management escalation
- **Dynamic integration** with **Microsoft Office** giving full document management
- **B2B** and/or **B2C customer relationship management** within one system
- **Dynamic analysis** and **detailed management reporting** on customers and suppliers, sales, service or products

