



Acuity - Customer Relationship Management Solutions

COMPANY: Accumulus Consulting

LOCATION: Addlestone, Surrey

SECTOR: Independent Financial Advisers

How do you track what is currently in your Sales Pipeline? Do you know how many calls and appointments your Sales People have completed this week? Are you on target to exceed budgetary Sales figures next quarter? Do you have access to this information when you wake at 4am in the morning or when abroad? If you can't answer positively to all of these questions then you need to be considering how a Web-Based Customer Relationship Management System can provide you with the information you need to drive your sales force on to exceeding their targets.

THE BRIEF:

To provide a web-based solution that would allow the visibility of Sales Opportunity pipeline, facilitate the tracking of all customer contact throughout the business and enable the high speed creation and distribution of e-shot mailers to keep customers abreast of developments. Functionality should also extend to allow the tracking of Marketing Campaigns allowing the analysis of the relevant success/failure of each campaign.

THE SOLUTION:

Acuity provided a Sage CRM Mid-Market Edition, CRM Solution providing a browser based system which ticked all of the boxes in the Accumulus requirement specification. The implementation of Workflow Management within the Sales Opportunity area of the system ensures that all Consultants adhere to the strict procedures imposed on the business through the Financial Services Authority and the senior management team.

THE OUTCOME:

Accumulus Consulting now have a business tool that empowers the workforce and provides the information required about their customers and prospects anywhere, anytime. The availability of such information has led to an increase in the time consultants spend on developing new business, which the Senior Management team forecast, will result in a return on their investment within the first 18 months.

“The implementation by the Acuity team has impressed us all and we are pleased to recommend them as like minded Professionals and work with them long into the future”

Geoff O'Shea (Managing Director, Accumulus Consulting Ltd)