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Martin Joy, CIO, Control Risks



Aspective, a Vodafone company helps risk management firm maximise the value of customer data

Fast facts

Customer: Control Risks

Web site: www.control-risks.com

Number of employees: 500 +

Country or region: International

Industry: Business support services

Customer profile

Control Risks is an independent, specialist risk consultancy with 18 offices on five continents.

Control Risks is an independent, specialist risk consultancy with 18 offices on five continents. It provides advice and services that enable companies, governments and international organisations to accelerate opportunities and manage strategic and operational risks in complex and hostile environments around the world. Since 1975 it has worked in over 130 countries for more than 5,000 clients, including most of the Fortune 100.

In support of the company's strategic objectives, Control Risks recognised the requirement to develop deeper, more meaningful relationships with its clients if they were to deliver the best possible services to them.

To achieve this it was necessary to improve the management of client information and to provide staff with a foundation for collaborating and sharing insightful client knowledge. Control Risks identified the need for a system that would allow it to view and manage complex client relationships whilst driving increased sales revenues and cross-selling opportunities.

Working with Microsoft's leading global CRM provider, Aspective, the Enterprise Solutions arm of Vodafone, Control Risks chose Microsoft Dynamics CRM due to its familiar look and feel as well as its overall ease of use, promoting widespread adoption.

Business situation

As a rapidly growing company, Control Risks assessed its information systems and processes to ensure that the underlying architecture was able to support its continued growth. With a great emphasis placed on having a detailed knowledge of complex client relationships, Control Risks' CIO, Martin Joy, knew that a fully functioning and easy to use CRM system was critical to the business.

He explained, “Many of our clients have a global footprint with multiple contacts in multiple locations expecting a fast, consistent response to their requests. We needed a CRM solution that we could quickly deploy worldwide, that staff would be able to pick up easily and that would serve as a platform to help drive growth and revenue. Our legacy CRM system and old paper-based systems and spreadsheets could no longer meet that challenge.”

Joy was also mindful that in order to really benefit from a CRM system, data cleanliness and integrity is paramount. He therefore set out to create a single repository that could be accessed from around the world, serving timely and up to date information to Control Risks staff. This would enable the highest levels of service to be given to clients at all times and ensure a coherent and consistent face for the company.

"A few years ago CRM had a bad name because the focus was on the technology as opposed to ensuring buy-in through creating a culture of data ownership, collaboration and standardised business processes. User adoption is an awful lot more effective however where the supporting system feels familiar and easy to use, so this was a key priority for us," Joy continued.

"Having researched a number of options, we chose a Microsoft Dynamics CRM system from Aspective. It offered intuitive Microsoft navigation, scalability, powerful reporting tools and quick and easy access to centralised client data, as well as tight integration with our existing Microsoft architecture."

The solution

Control Risks implemented Microsoft Dynamics CRM in a phased roll out to 550 client facing users globally, including management, sales and business development and importantly the consultants delivering the services. The system also featured integration into the back office departments through a link with the existing time and billing application. In over 12 months, Aspective's experienced team supported the system integration across 18 individual offices, one of the largest Microsoft Dynamics CRM roll outs to have ever taken place.

By training up "super users" within each office, Control Risks aimed to develop a team of locally-based staff that could generate business ownership by championing the use of the new system and provide an element of first level support where needed. Joy explained, "In order to effectively embed the new system into our everyday working practice, it was vital that the users were comfortable and confident entering the data into the system and that they gained value from it. All information within it had to be clean, up to date and relevant. The super users were in place to aid this process and increase the quality of the data held and benefits realised by the business."

Integrated with a Microsoft SQL Server database and Microsoft Exchange Server, Control Risks now has a single repository for all client data hosted in-house in a secure datacentre in the UK and mirrored at a separate facility in the USA.

Having implemented Microsoft Dynamics CRM, Control Risks has a powerful client management system, integrated with existing applications and available throughout its many offices.

Business benefits

Having implemented Microsoft Dynamics CRM, Control Risks has a powerful client management system, integrated with existing applications and available throughout its many offices. It offers a single, detailed view of the status of client relationships and prospects, enabling staff to react quickly and effectively to requests and with the confidence that they have all of the necessary information available to them.

Higher up the business, the system has allowed management to quickly run group-wide snapshot reports or alert business development and sales representatives to possible opportunities.

Other key benefits include:

- Enables international collaboration on client accounts
- Multi-level authorisation can be set on any account to respect sensitivities
- Each level of client relationship can now be logged and tracked to allow a more structured view of each account rather than a simple horizontal image
- New engagements and prospects can be entered into the system as pre-sales with enforced follow up, reducing number of lost opportunities

- Fully integrated with reporting system, giving the ability to view sales pipelines across the group, as well as by office/location/departments, thereby providing a broader view to base business decisions on
- Back office integration with time and billing applications

"We are still only at the beginning of a journey however," summarised Joy. "CRM is about how Control Risks wants to interact with its clients. This covers culture, process, information, ownership and of course the system."

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