



Kalahari Manages Project Complexity with Sage CRM SalesLogix Solution

Customer Profile

Kalahari is a global provider of real-time price discovery and analytic solutions to financial and energy trading institutions in over 16 countries. It has been providing clients with software solutions, professional services and strategic consulting for more than 15 years. Across the world, over US\$2 trillion are traded in real-time every day using tools provided by Kalahari.

The company uses the common infrastructure of its market-leading kACE™ solution to build bespoke desktop applications to support traders in different market sectors. Kalahari's client list reads like a 'who's who' of world-leading banks and other financial institutions, global inter-dealer brokers, and energy & utility companies. Among these clients are organisations of the calibre of Commonwealth Bank, ICAP, ING, HBOS, Rabobank and Tullett Liberty plc.

Kalahari has offices in the UK and USA and has forged a number of strategic alliances with leading financial services and technology firms. Its headquarters are based in Old Woking, Surrey.

The Challenge

Like most businesses, Kalahari generates large volumes of data about its clients and projects on a daily basis. Previously this information was not integrated within any centralised store or with the company's in-house systems, such as those logging clients' software components and providing telephone and on-site customer support.

Peter Trenier, Managing Director at Kalahari, explains, "We began to look for a solution which would capture all the information we hold across the complete lifecycle of the client relationship; one that could encompass call-logging by our support teams and provide an efficient sales management solution for our sales team."

Kalahari had further, specific business objectives, as Peter notes, "We wanted to get a much better handle on our revenue stream. In particular, we recognised the need to build up a more precise picture of our outgoings and to measure accurately the break-even point beyond which projects become profitable. Our instincts told us that we were not charging fully for all the professional services we deliver."

“ In the drive to service quality, it is easy to overlook the time our teams invest in client projects. With SalesLogix, we can put a true cost to the work we do. ”

Peter Trenier, Managing Director, Kalahari

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The Solution

Kalahari found that researching the customer relationship management (CRM) market was diverting time from its business, so turned to Sage Business Partner Seelogic for advice. After careful analysis, Seelogic recommended that a Sage CRM SalesLogix solution would meet Kalahari's requirements, and a 20-licence SalesLogix solution was purchased.

Peter comments, "As a company, we pay great attention to service quality, and were impressed by Seelogic's thorough approach. Rather than giving us the hard sell, they focused immediately on our issues and suggested ways in which a CRM solution could add value to the business."

Seelogic's preparation for the implementation involved in-depth scoping of Kalahari's requirements and detailed planning, with the result that the installation went through smoothly, and with no surprises. Seelogic also carried out some additional development work to enable the company to capture specific project information.

Soon, virtually every member of the Kalahari team of consultants, sales teams and client support staff, in the UK and overseas, was able to use the live system.

The Benefits

Today, SalesLogix has become an integral part of the Kalahari business. Peter says, "SalesLogix runs down the core of what we do as a business and is a reference point for us all. It provides an easily accessible, centralised space in which to store facts and figures about projects and clients. We all have at-a-glance 'headline' data such as

the client's details, project summary and project manager, billing details, and so on. This 'front-to-back' integration of data supports us in delivering excellent service both during the sale and in subsequent account management. We're also able to store corporate knowledge such as product licence details and can plan for the future with confidence in the quality of the underlying data. "

Excellent service must be delivered profitably, and this is a challenge when, as in Kalahari's case, projects are highly complex. Moreover, revenues come in on a rental basis and can be spread over a number of years. With the majority of manpower costs being incurred in the early stages of an implementation, the point at which projects start to become profitable can be some months after the initial sale. To calculate the break-even point, the company needs an accurate means of logging the cost of consultants' time to ensure that projects are correctly priced.

Peter remarks, "In the drive to service quality, it is easy to overlook the time our teams invest in client projects, any one of which can involve a whole raft of activities: scoping, software development, installation, training, further development and support. This means that if we're not careful, we lose track of what it costs us to implement a solution."

Peter describes the situation today, "With SalesLogix, we can put a true cost to the work we do. We now have the tools to gather and analyse data across the company to uncover the full value we bring to the client. Our teams have an easy-to-use system against which they log the hours spent on projects, so that we can

measure actual costs against projected costs. We're able to compare what we are billing for our consultants' time against our manpower costs, so we can calculate our profitability. By gaining a clearer view of our revenues and costs, we're aiming to reach break-even stage more quickly."

The Future

Kalahari's SalesLogix solution has now been operational for several months and is becoming firmly embedded within the organisation.

Looking forward, Peter says, "We're just about to do a procedure review and will be exploring ways to leverage the solution further, with continued support from Seelogic. Now that we have the right infrastructure in place, we're keen to harness the full power of SalesLogix to support our sales executives even more on the sales prospecting front. It's reassuring to know that we have not yet exhausted all its possibilities."

Solution Overview

- Fully integrated information on projects and clients, collated from all parts of the company.
- Information easily accessible by Kalahari's global team.
- A centralised store of information across the client lifecycle to support delivery of excellent service and responsive support.
- Greater understanding and control of revenue streams from complex projects.
- A solution with the scope to expand in line with changing business requirements.

About Sage

Sage is a global provider of end-to-end business management applications for mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Integrating powerful front-office Web and wireless capabilities with back-office accounting and operations, Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit www.sage.co.uk or contact us at crm@sage.com