



## Sage CRM SalesLogix Solution Supports Leadent's Growth Strategy

### Client Profile

Independent management consultancy Leadent has a clear business mission: to help its clients build an agile, competitive and profitable business. The company's core services are in business & technology consultancy and change & programme management. Leadent attracts clients from a very broad spectrum of sectors, including the utilities, public services, retail and consumer products.

The Leadent team brings a combination of consulting and industry experience to clients' projects, which are often worth tens of millions of pounds. Businesses which have called on Leadent include the Threshers off-licence chain, the Whitbread leisure group, and utility Anglian Water.

The company has 25 full-time employees and a turnover of around £3 million.

### The Challenge

Having started operations just four years ago, Leadent has experienced rapid growth, with revenues increasing by 50% over the last year. Expansion is expected to continue at

least at that level for the foreseeable future. A move to new headquarters at Tackley near Kidlington, Oxfordshire, reflected the company's growth.

This measurable success, a strong client list and a full order book are everything management could wish for, but with them comes the challenge of maintaining control so that customers' requirements are met in a profitable manner. Moreover, Leadent often competes against 'the Big Four' consultancy firms and must be extremely professional in its handling of projects and accounts.

Leadent had been using the Sage ACT! Contact Manager but recognised the urgent need for a step up in support for customer relationship management (CRM). Richard Hawthorn, Business Development Director, gives more details of the situation facing Leadent: "We were flying as a business but definitely wanted to improve our account management, particularly the time it took to gather together all the relevant information. We looked for a heavier-duty CRM solution which would support managers and teams across Leadent."

Our aim is to transform our clients' businesses, and they look to us for best practice. SalesLogix helps us to satisfy these needs, and exceed their expectations.

Richard Hawthorn,  
Business Development Director, Leadent

As a provider of expert technology consultancy itself, Leadent was well placed to assess the CRM market; and different solutions and providers were considered. After seeing several solutions demonstrated, Leadent selected Aylesbury-based Sage Business Partner Seelogic to supply and support a Sage CRM solution.

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## The Solution

Leadent purchased a Sage CRM SalesLogix solution, with 10 licences, for users based in the Tackley office and remote access for directors and consultants working on clients' premises and other locations.

Seelogic soon had the project fully scoped, quickly followed by development, implementation and testing of the SalesLogix solution. User training then went forward smoothly. Richard comments, "We were impressed by just how rapidly Seelogic got to grips with our business. They provided a very comprehensive blueprint for the solution, showing they fully understood our requirements. But even better, they consistently added value from their extensive experience – and continue to do so."

## The Benefits

Today, Leadent is on the way to experiencing the classic benefits of a powerful CRM solution. Richard explains the value this brings to the business: "SalesLogix has increased the level of control within our business. We can log opportunities, achieve greater visibility of the sales pipeline, and understand where our manpower is being deployed."

Remote access has proved an essential aspect of the solution, as Richard remarks, "Our people are out in the field most of the time. Now, I can view the same data about a project or sale as the consultants working remotely. This enables us to co-ordinate progress and also offer timely support. This level of synchronisation was one of the main drivers for moving to SalesLogix."

A 'projects repository' provides a central store of essential facts and figures about a project, which any authorised member of staff can access. The data contained

includes headline information such as the client's details, project summary and project manager, billing details, and so on. Building up 'knowledge assets' from experience gained on wins and projects will support Leadent in tendering for future business.

Richard notes, "We operate in a highly competitive field and SalesLogix helps us to be extremely efficient with our account management information. Now, rather than information residing with a single individual, it is available at a glance to everyone working on a sale or project. Communication is meticulous; the whole account team is kept fully up to speed and can therefore respond more efficiently to any queries or issues. Moreover, our aim is to improve and even transform our clients' businesses, and they look to us for best practice. SalesLogix helps us to satisfy these needs, and exceed their expectations."

Richard stresses, "The sheer number of prospects and client engagements means we have to have the right tools to manage the workload efficiently. Furthermore, lead-time on deals can be protracted and it's vital to keep an accurate record of the status of a deal, who spoke to whom when, and so on. This is particularly true for the public sector, where the procurement process can take up to a year. This is where SalesLogix really comes into its own as an essential business tool. Every day, it proactively prompts us with lists of actions, details of meetings, and priorities, so nothing drops off the edge."

"Central to our business is being able to bill accurately for consultants' time. Our new SalesLogix solution 'mimics' a previous solution whereby consultants send in Microsoft Excel spreadsheets of how many days of their time are booked out. This provides an easy way for us to look at

planned activity and projected revenues. We will in the future be looking to use the calendaring functions within SalesLogix to schedule manpower. We reckon we must save a day a month in administration. But it's not just about 'cost-cutting'; the main benefit for the Leadent business is to assist our growth. We would not be able to grow at the pace we are doing without SalesLogix to support us."

Leadent is using SalesLogix to capture all client contact details. Richard is currently storing contact details from the IT Directors Forum he recently attended. SalesLogix will help in maximising this data, reminding him of the appropriate follow-up action, such as sending a brochure or arranging a meeting. Client data can be cut any way Leadent requires, to target a sales campaign or communication at a specific industry sector or company type, for example.

## The Future

With Seelogic's continued support, Leadent is now planning to embed the solution further into its business and also extend usage across all its sales and consultancy teams.

There is an additional impetus for the company's increasing reliance on SalesLogix. It has recently been approved as a vetted supplier for the Government's new Catalyst Framework Agreements, so its business in the public sector is set to expand significantly as the framework is adopted.

Richard sums up the impact of the SalesLogix solution: "We have placed a strategic focus on growing our business sector by sector, and SalesLogix supports us hugely in this. As developments such as Catalyst turbo-charge Leadent's business, SalesLogix will be a powerful force in our expansion."

## Solution Overview

- Provides a central store for comprehensive data on clients and projects.
- Information easily shared across the team to improve account management and support.
- Increased visibility of business data for improved management control.
- Accurate tracking and billing for consultants' time, with the ability to view projected revenues.
- Supports future expansion into new areas of business.

## 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](http://www.sage.co.uk) or contact us at [crm@sage.com](mailto:crm@sage.com)