Achiever Software

Case Study

Connaught Compliance Services

Risk Management Solutions specialist Connaught Compliance Services needed a highly flexible information management system that could meet hugely diverse needs from telemarketing to appointment scheduling, billing to workflow management.

The company thought it was asking the impossible . . . until they spoke to Achiever Software

Connaught

Achiever software

Information Management in safe hands

Connaught Compliance Services Ltd provides risk management services to 40 of the UK's FTSE 100 companies and its client base includes most of the UK's major food retailers, property managers, manufacturers and financial institutions.

This involves Connaught's 780 employees in a wide range of diverse business activities from conducting safety assessments and asbestos inspections to marketing and training provision. Various disparate systems supported some business processes but most were handled manually.

The lack of a single view of the customer resulted in vital information being diluted and in some cases missing. Often, if someone left the company, important information disappeared with them. Connaught was unable to measure staff performance reliably, identify trends, manage quality and capitalise on sales opportunities. Recognising that the right Customer Relationship Management (CRM) system could help it function more efficiently, Connaught embarked on its search for a solution.

The Challenge

The company had very demanding requirements. Any CRM solution would need to meet the functional requirements of all Connaught Compliance Services' departments, integrate with its finance system, Sage Line 500, and allow remote access to its consultants.

"We didn't have to force our business processes to fit a standard product – Achiever tailored its product to fit us."

Although Connaught considered several suppliers, Achiever stood out as, explained by Information Systems Manager Linda Gatehouse, "It was the only supplier that could provide the all-round solution we needed for our business. We went to Achiever with a wish list and Achiever customised its system to meet all our requirements. We didn't have to compromise by forcing our business processes to fit a standard product – Achiever tailored its solution to fit us."

A Smooth Implementation

Achiever worked in close collaboration with Connaught throughout the development and implementation process. Achiever Director Lisa Chick explains, "Years of experience have shown us that involving customers at all stages instills confidence in the system, helps transfer knowledge and encourages buy-in from users."

The system was introduced on a phased basis, department by department, over a two-year period from October 2000. The Achiever solution has evolved over the years as Connaught Compliance Services has grown both organically and through acquisitions.

Today, Achiever is used across the organisation to fulfil a multitude of different functions. Linda Gatehouse comments, "We rely on the system in so many areas, it is no exaggeration to describe it as the backbone of our operation. It's used by everyone from administrators to the MD."

"It is no exaggeration to describe Achiever as the backbone of our operation"

Linda Gatehouse, Information Systems Manager

Invoicing

The Achiever system integrates with Sage Line 500 to reduce administration time and eliminate duplication of work. Intricate integration rules were set up between the two applications to handle Connaught's complex invoicing requirements, which arise from the need to offer numerous billing options.

Appointment scheduling

This function is extremely important to an organisation like Connaught Compliance Services. The system is used to book client appointments, schedule consultants' visits and arrange sales calls.

Workflow management

Connaught Compliance Services uses Achiever's workflow capability throughout the organisation to manage both simple and complex business processes. For instance, it has automated the laborious manual processes involved in managing asbestos inspections for an insurance client. A process that used to take hours is now completed in minutes, enabling National Britannia to meet its Service Level Agreement obligations by making contact with the householder earlier.

Marketing

Achiever is used to produce mailing lists for Connaught Compliance Services' quarterly newsletter, Responseline.

Telemarketing

The telemarketing team uses the system to diary date and record follow up calls, capturing information on prospective customers and ensuring no sales opportunity is missed.

Customer Relationship Management

Connaught Compliance Services is able to track every point of contact with a customer from the initial enquiry to the invoice for each job delivered.

Training

The system is currently used to schedule trainers' time and capture delegate details but has the potential to do much more, a capability that Connaught fully intends to exploit in the coming months.

Management information

Achiever can produce meaningful management reports in seconds. Connaught has configured these to show key performance indicators such as utilisation of consultants' time, profitability of contracts and adherence to service level targets.

With Achiever's help, Connaught Compliance Services has dramatically improved service levels, quality and productivity throughout the organisation to the extent that despite making four acquisitions in a 12 month period, the company has not needed to take on additional staff to support the business.

Another measure of success is its ready acceptance by the Connaught workforce. "I constantly get lots of positive feedback from around the business as well as requests for future development as people know we have the flexibility to change elements of the system" says Linda .

A Partnership Approach

Linda describes Connaught Compliance Service's relationship with Achiever. "From the very beginning Achiever has always been there to help us. Every member of their team is very knowledgeable and they've taken the time to understand our business and requirements.

"This means they're very proactive when it comes to suggesting solutions to a problem. I had a situation recently that I thought would involve a fundamental system change. I spoke to my contact at Achiever who came up with a simple solution over the phone that I could implement in five minutes!

> "The support we get from Achiever is excellent – they go far beyond the letter of the contract."

"Achiever's policy is for the team that manages implementation to look after you for the life of the contract, I still speak to people I first dealt with seven years ago. As a result, we have forged a very strong relationship."

Looking to the Future

Two major benefits of an Achiever solution are its scalability and flexibility. As Connaught Compliance Services has grown, so has the system and its uses. In the future Connaught will be looking to upgrade to Achiever Anywhere, the web-based version of its existing system, which will give the firm complete remote access to their data anytime, anywhere.

We ask Linda Gatehouse if the original decision to choose Achiever has been vindicated. Her reply is unequivocal. "In my role I work with many products and Achiever is by far the most user-friendly. The workflow capability, in particular, has been an absolute godsend for us as we use it in so many areas of the business. Most importantly of all, the support we get from Achiever is excellent – they go far beyond the letter of the contract."

About Achiever

Making systems meet the grade

Hundreds of businesses in the Public and Private sector use Achiever's Customer Information Management solution to manage their business. Users range from 15 for a pilot system to over 2000 plus for enterprise-wide solutions.

Designed with the customer to create a unique business solution Achiever is implemented using a proven methodology that has been developed using over 14-years industry experience where training, user-acceptance testing and user buy-in are integral to the success of the project.

Achiever Software accreditations include:

- Prince 2 Practitioners
- ISEB Consultancy and Testing Standards
- ISO 9000

Want to know more?

Contact us now to discuss your requirements in more detail.

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