

Uniting business processes around the world for 2CV



An Access CRM case study

Company profile

- Integrated marketing research company servicing many leading global brands
- Established for more than 25 years
- Headquartered in London, with an administrative hub in Salisbury
- International satellite offices located in the USA, Singapore and Hong Kong
- Approximately 130 employees

“Having visibility of what’s coming down the line in terms of billing is really important to us.”

Alison Drake,
Financial Director

Executive summary

2CV is an integrated consumer research agency specialising in carrying out qualitative and quantitative research for clients, many of which are leading global brands.

The business has been established for more than 25 years and since 2000 it has grown turnover by a factor of ten. Currently, it is pursuing opportunities to expand its interests in Asia-Pacific. As it grows, there is a strong desire to increase turnover without increasing the costs of supporting those delivering core business services to clients.

Key benefits of Access CRM

- Vastly simplified reporting utilising accurate, real time data
- Accessible system to the international team to the same information, at any time
- Integration of Access CRM to the finance system means data is only entered once
- Customisation of the system enabled revenue forecasting functionality, enabling greater visibility.

“Trying to stay ahead using spreadsheets was a bit of a nightmare. A lack of reporting made it tricky to understand the opportunities we had and it was difficult to get at the revenue for planning purposes.”

Alison Drake,
Financial Director

The challenge

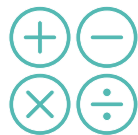
2CV core business services are provided by small globally dispersed teams. A modestly sized UK-based team provides centralised administrative support for all of them. From business planning to billing, payroll and expense management, everything is channelled through the UK administrative nerve centre in Salisbury.

Alison Drake, Finance Director says: “Since around 2000 the business has grown strongly. However, there was a reliance on labour intensive manual processes. Unfortunately, the worst effects of these impacted the finance department.”



Database limitations and spreadsheets

“We were using a custom database to generate project numbers. This only allowed us to input a limited amount of information and we couldn’t extract, report or analyse it in anyway. Once entered on the database, we would then add the full project details into a spreadsheet. One of the key information streams we needed to access was revenue forecasting.”



Project visibility and billing

She continues: “As a people based business most of our costs relate to staff, and it’s not easy to downsize quickly. Projects start up and run for a number of months and then conclude.”



Disparate processes

And it wasn’t just keeping track of core business activity that was forcing the need for change. Alison Drake says, “When employees start picking out their own tools from the internet you need to recognise that what they are really saying is: We need to find a better way to bring our business processes together!”

Access CRM: the solution

2CV selected Access CRM as it;

- is flexible, best in class CRM solution supporting a range of deployment scenarios,
- provides solid core functionality customised to meet their specific needs, and
- offers great value for money.



“Data is entered just once and is used all the way throughout the process. This ability, to take CRM data and push it on into the sales ledger, really sold it to us.”

Alison Drake,
Financial Director

The results

The Access CRM platform vastly simplifies reporting for 2CV. Each small internationally dispersed team is able to access the cloud-based CRM solution at any time to undertake a variety of business processes.

“It’s a conveyor belt with very little requirement for manual intervention and it’s an ideal scenario for us,” says Alison Drake.

She continues: “Our research directors enter opportunities which move along the belt, eventually becoming an invoiced job if the project is won. The CRM system is customised to provide the revenue forecasting functionality. We can now understand where we are and the opportunities much more easily.”



Leveraging the broad Access platform

Access CRM was the first app 2CV adopted from the Access solution ‘stack’.

“The next thing we adopted was Access Capture, preventing the need for purchase ledger to copy-key invoice data. After that we rolled out Access Expense which has eliminated the need to send bundles of receipts across the world to support the expense repayment process.

A natural add-on here is the Approve function. This plugs in to the Expense framework as well as smoothing the accounts payable process,” says Alison Drake.



Growth through technology

She continues: “We are a growing business but we don’t particularly want to grow the team. The early indication is that Access lets us manage growth without adding cost. We have avoided the need to increase the finance team and can focus on the things that add value to our business rather than just processes which add very little value.”



Real-time data accuracy

“It’s also the quality and accuracy of data. We’re looking at real time data all the time. At any given time if someone asks me where we are, a couple of clicks and I can tell them. It’s impossible to put a value on that, but it’s worth its weight in gold in terms of steering the business,” Alison Drake says.





About The Access Group:

The Access Group is a leading provider of business software to mid-sized UK organisations. It helps more than 14,000 customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace technology transforms the way business software is used, giving every employee the freedom to do more.

Established in 1991, The Access Group, with an enterprise valuation of £1billion, employs more than 1,500 staff.