

BusinessWorks makes marketing work for Horwath

Overview

■ The Challenge

Accounting services firm Horwath in Melbourne, needed a better way to coordinate its marketing activities. Individual divisions and Directors managed their own contact lists which were circulated on spreadsheets. This meant that some clients received multiple messages while others missed out completely.

■ The Solution

Horwath turned to IBM® Business Partner⁷ ISW to implement its BusinessWorks customer relationship management (CRM) system based on IBM Lotus® Domino®. This allowed the firm to capture the distributed islands of information and staff members' tacit knowledge into a central and formal environment.

■ The Benefits

The CRM system gives all Directors and marketing staff a complete view of customers and the company's interaction with them, ensuring everyone in the business is working with the same information. The system can easily be modified to extract new reports and provides a base for future expansion.



About Horwath Australia

Horwath Melbourne is a member of Horwath international, which has more than 110 firms and over 415 offices around the world. As one of Australia's leading associations of independent accounting tax and consulting firms, Horwath provides services to the middle market and specialist areas.

Horwath's business philosophy is to work towards gaining a full understanding of their clients' business objectives. With a focus on developing long-term relationships, Horwath uses its experience and skills to offer proactive and relevant services and advice to clients.

In danger of losing contact

Horwath has a number of divisions in Victoria with individual Directors managing separate lists of client contacts. As the business grew, an emphasis on individual client service led to a piecemeal approach when it came to broader marketing activities.

There was no central way of tracking client contacts. If marketing or professional staff needed to contact a client, they would not necessarily have the latest information regarding that client's contact details, situation or developing needs. This meant there was always the risk of missing out on business opportunities or even losing existing clients.



Staff responsible for client events and marketing initiatives found it difficult to retain useful, current information. For example, when the organisation wanted to hold a client or new business event, it developed invitation lists by circulating a spreadsheet. Directors were invited to add the names of their clients or business prospects. This fragmentation led to some clients receiving multiple invitations, and others missing out completely.

The company clearly needed a way for staff to access up-to-date customer records in a consistent format that also allowed the firm to access and track all contact with individual clients. A consistent approach would give the marketing department the opportunity to deliver better targeted campaigns.

BusinessWorks uses IBM Lotus technology for efficient CRM

Horwath Marketing Manager, Alyson Gibbs, approached IBM Business Partner† ISW to implement a customer relations management (CRM) system. ISW is a software and services company and an IBM authorised education centre.

ISW implemented its BusinessWorks CRM solution based on IBM Lotus Domino. BusinessWorks improves access to client information and supports marketing and relationship development activities.

“Horwath was a typical example of an organisation with islands of information and tacit knowledge in everyone’s heads,”

Adam Brown, Executive Director at ISW Development.

“I always had confidence that, from a technical point of view, the solution would work. We’re providing a repeatable solution with a high level of customisation to suit Horwath’s needs. The challenge was always going to be getting the buy-in from users.”

To manage the process of changing to the new system, ISW conducted end-user training at Horwath’s offices in Melbourne.

The solution is installed on an IBM Lotus Domino server, which has the advantage of being able to run on a choice of Windows®, Unix®, Linux™, iSeries or mainframe systems. In addition, the system utilises Horwath’s

existing IBM Lotus Notes messaging environment. This reduced the amount of training and change management required to introduce the new application.

“Another advantage is that the IBM Lotus Domino infrastructure can be leveraged to create new solutions when the business is ready,” said Brown.

While the system is hosted on servers at Horwath’s offices, ISW supports the solution remotely. If Horwath staff phone the help desk, ISW support can connect to the network and look at the system to provide instant assistance.

The CRM database is structured to record a history of letters and correspondence, emails, meeting notes and points of interest. It includes an opportunity management module that allows Partners to record an opportunity so others can be notified. The resource works as a knowledge management tool as well as a CRM system.

“We can only offer services to a client that are relevant to a them at that particular time,” said Gibbs. “But we can go back through the opportunity system, so that when the time is right we can follow up on that specific opportunity.”

Better tools for strategic marketing

Strategic marketing is now a key part of Horwath's business and is perceived as a vital resource for sustained growth. The CRM system gives all Directors and marketing staff a complete view of customers and all their interactions with the company.

"Because everyone is up to date, there is no conflict within the organisation," said Gibbs. "If you're on different tangents it can create a lot of confusion. But now we can manage the mailing list for seminars and newsletters with a great deal of efficiency. We don't need to go to through the whole data collection process each time. We also know we have the most current information."

The solution also includes a marketing library, which is a repository for marketing resources such as brochures, case studies, profiles and collateral. This ensures everyone in the organisation can rely on marketing materials being approved and current.

"Most importantly, Horwath now has explicit knowledge," said Brown.

"The organisation has the information and is able to share knowledge in real time. Knowledge management is all about converting tacit knowledge to explicit knowledge and this is what BusinessWorks has delivered for Horwath."

New system easy to use and change

Occasionally Directors ask for a report, such as the last 10 interactions with the client, in preparation for a meeting. ISW recently developed a reporting feature that allows staff to call up all the activities that took place with a client in a specified date range.

"The success of the project so far makes it easier to propose enhancements to management," said Gibbs. "For example, we're working with ISW on integration and synchronisation with handheld computers and I'm confident that we will be able to move down that path in the not-too-distant future."

The system has exceeded Horwath's expectations. Staff can now access all the company's up-to-date client records from any location. Duplicate communications are no longer a problem and any developments in customer relations are now visible to all authorised personnel.

"The CRM marketing and business development solution has been delivered with scalability, flexibility and provides the opportunity to access information that will help transform the business," said Gibbs.



For more information

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