



## Microsoft Customer Solution Customer Solution Case Study

# JustGoodBusiness

DEVELOPING COMPANIES

### Overview

Country: UK

Industry: Professional Services

#### Customer Profile

Just Good Business is a young and dynamic company which offers a complete range of business services to help its clients grow; from providing business skills, to locating sources of funding.

#### Business Situation

The major challenge facing JGB is to monitor and manage the development of its client companies, both for the clients' benefit and for that of JGB.

#### Solution

This project wasn't so much about solving a problem as it was about recognising there would be a problem and helping the entrepreneurs that run these businesses to avoid it.

#### Benefits

- Savings in excess of £20,000
- Better data visibility
- Improved security
- Tighter control

## Making savings of £20,000+ with CRM is Just Good Business

We needed a CRM system to monitor our clients and help them establish best practice; to make them see the importance of customer data.

*Bernard McMahon, Chairman, Just Good Business*

Just Good Business (JGB) provides a mix of consulting and venture capital services to a range of clients. To nurture these clients JGB needed a Customer Relationship Management (CRM) system that could be rapidly deployed, would be easy to use and would offer a cost-effective solution to the customer data management needs of itself and its clients.

## Situation

Just Good Business (JGB) is a business consultancy and venture capital firm based in the north of England. Since 2002 JGB has built a portfolio of client companies that it helps with a mixture of practical advice and financial assistance. Some of that funding comes from JGB's own business angel backed funds and some is secured from public sources, such as government agencies and the EC.

Taking a stake in a client company in return for its investment injection, JGB helps manage its clients through challenging periods of growth; often a difficult time for young businesses and a time when many fail through lack of experience, as JGB's chairman Bernard McMahon explains: "Many of the businesses we work with have been started by an entrepreneur who, although they may be very gifted in many respects, frequently lack the business skills and experience required to make the jump from enthusiastic start-up to mature growing business. This can be a make-or-break period in the life of many companies. We step in and, by working with the client, help them identify and put in place the right skills to move forward. Sometimes this requires ongoing consultancy, sometimes there is the need to find additional funds."

The major challenge facing JGB is to monitor and manage the development of its client companies, both for the clients' benefit and for that of JGB. Currently, JGB is working with seven clients, all at different stages of their development and with different levels of business acumen. JGB plans to grow this number to around 30, which will see it working with a wide variety of companies, all different sizes, operating in different sectors, and with different requirements. One thing they will all have in common is the need to maximise the value of the relationships with their customers; something that JGB needs to

ensure if it is to see its investments deliver results.

With these investments coming from a variety of sources, UK public sector, Europe and from private investments, there was a very real need for a customer relationship management (CRM) application that would give JGB and its clients instant access to the information they need.

"We needed a CRM system to monitor our clients and help them establish best practice," says Bernard McMahon. "We needed to have a complete view of their business and to be able to use the information available to make them see the importance of customer data."

JGB turned to The CRM Business, a certified Microsoft partner that specialises in the deployment of Microsoft® CRM®, to help with this project.

Roger Collins, Managing Director of The CRM Business takes up the story: "The problem JGB asked us to solve was how they could provide each of their clients with their own CRM system while at the same time having one central system that JGB itself could use both for its own internal purposes and for managing each of its clients."

## Solution

JGB has a database of thousands of businesses and contacts that its clients could potentially trade with. One of the key challenges it faced was how to make this information available to all its clients and at the same time maintain visibility of how the interactions with these potential customers was progressing. To meet JGB's needs, The CRM Business has partitioned the MS CRM system so that the client companies are able to access what is in effect their own mini MS CRM system, while JGB is able to view all data pertaining to all clients. Acting as host

and systems administrator, JGB is able to offer an enhanced service to its clients and maximise its own CRM at the same time.

"Business development is a vital part of what we do and that requires performance management and measurement," says Bernard McMahon. "This approach gives us the control we need and gives our clients access to an MS CRM solution that they would otherwise have been unable to afford. We are aiming to have in excess of 30 client companies and as certain ones grow they will adopt their own MS CRM system."

Planning for future growth is a theme that is at the heart of JGB, as Bernard McMahon explains: "This wasn't so much about solving a problem as it was about recognising there would be a problem and helping the entrepreneurs that run these businesses to avoid it. We want to show our clients how to find customers and get the most out of the relationships they have with them; to exploit the strength of those relationships."

The security features in MS CRM were a great fit for this, allowing special job roles that control access to data to be set up where needed. The System Customisation tools within MS CRM also meant that security roles could be set up to exactly match the needs of the business units within JGB's structure – all without the need for complex and time-consuming coding at all.

Choice of partner and supplier is vitally important in any major IT project and Bernard McMahon feels the choices JGB made were exactly right. "We are a Microsoft based business. We know and understand Microsoft technology. Two of our clients have developed .NET applications and given MS CRM's .NET heritage this is another reason why it was a good choice for us. I've used many other CRM and contact management applications in the past but simply none of

them work with a dispersed team – unless you are looking at the high-end enterprise applications, which would obviously have been inappropriate for us."

He also feels strongly that The CRM Business's contribution was extremely important. "I've known Roger Collins for quite some time, which meant I knew The CRM Business' strengths and capabilities. There are not many other partners out there that would have spotted the possibility of using MS CRM in this way. When I explained to Roger what I wanted to do he came back with a plan of how to deliver precisely what I needed. We've got a simple and effective solution that meets our needs today and will grow with us."

## Benefits

Whereas some IT projects are all about replacing tired old systems with new technology that saves time and money, the JGB installation of MS CRM was more about ensuring there was a solid foundation for future growth; growth for JGB and for its individual clients. But a simple analysis of the alternative courses of action quickly demonstrate that JGB's MS CRM system will more than pay for itself. "If we hadn't gone for the hosted option for our clients, we would have had to employ someone to handle the installation of the client-side CRM systems and to then manage the pipeline in the case of each client," says Bernard McMahon. "With that alone taken into account, we have saved between £20,000 and £30,000."

Two other major benefits of the project are security and customisation. From the security point of view, the system has been configured so that only the right people can access particular data sets and sensitive information, and that one client would not be able to access any others' data.

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To build in guarantees for future compatibility with system upgrade – as well as to cater for clients yet to come – the MS CRM system benefits from a suite of customisation tools which meant The CRM Business could give JGB assurances about future flexibility within the system without JGB having to rely on expensive software coding.

Speed and ease-of use are also important benefits. The system caters for a dispersed set of users, some accessing it via the web, yet its performance remains consistently high.

## Boilerplate Title

Boilerplate Text

## Software and Services

### ■ Solutions

– Microsoft Business Solutions CRM

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Document published November, 2004

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