



# Hadley Group

## A Microsoft Dynamics CRM rescue project for UK manufacturer

### Summary:



Business critical CRM project rescue



Expert CRM project advice to support business change



Guidance and support through development and adoption



Ensuring high staff adoption and improved performance



Marketing automation and legacy ERP integrated

### The Challenge:

#### Recovering a failed CRM implementation

Hadley Group has ambitious expansion plans. Management knew that an effective CRM system would underpin growth and dramatically increase internal opportunity and project visibility through marketing and relationship management. They were eager to reap the business benefits of CRM, but working with another consultancy firm, the project had ground to a halt.

CRM Project Manager David Round explains, *“Our previous consultants didn’t have the necessary expertise, which led to poor planning and us having to drive the whole process ourselves. That wasn’t the level of support we wanted. We had to look for a new partner who could recover the process and get us back on track to deliver the critical business functions we needed.”*

This was Hadley’s third attempt at implementing CRM, so the stakes were high. The team needed to find a reliable and capable consultancy partner who would quickly get to grips with the business challenges and deliver the solution.

It’s a common scenario. CRM consultants sell their expertise well but lack experience and capability when it comes to project delivery. Xpedition’s understanding and track record of recovering failing projects reassured Hadley Group that their project could be rescued on time and on budget..

### The Solution:

#### A trustworthy partner with the expertise to deliver

Xpedition consultants designed a solution that brought together Dynamics CRM, a legacy Baan ERP system and the ClickDimensions marketing tool.

David Round was immediately reassured by Xpedition’s comprehensive and pragmatic project plan. *“They quickly got to grips with our complex ERP system, giving us even more confidence that we’d found an effective partner. The main consultant and our account manager have been excellent – all Xpedition’s people are top notch.”*

From the outset, Xpedition delivered on its promises. Within four months, the implementation was ready to go live, including an upgrade to the latest Dynamics release.

**“Xpedition was recommended by one of our vendors. After our previous experience we had to be sure the sales pitch was backed up by responsive service and deep knowledge. We were impressed and convinced after we visited Xpedition and talked to the team; they quickly identified some of our key problems, showing us they knew their stuff and had the depth of experience we needed”**

David Linthwaite, Group IT Manager

**“Xpedition proved they could recover our CRM project and get us back on track to deliver the critical business functions we needed.”**

David Round, CRM Project Manager

## Simpler is usually better

Today modern technologies can do almost everything. This can cause implementations to be over-engineered and impossible to use. Xpeditio help focus your team on the business critical functions, so that your solution actually works.



### The Results:

#### Shared information for productivity and cross-functional teamwork

David Round is clear about the business benefits: *“We have so much more visibility of our sales resources, with accountability and discipline built in. We can work in a team based way, so across the business people have the same view of the sales pipeline, what they need to do to support it and where the priorities are, while everyone is kept informed of progress. Microsoft Dynamics gives us the platform we needed to bring marketing, sales and manufacturing closer together so we can operate more efficiently and be thoroughly responsive to our customers.”*

Integrating ClickDimensions gives Hadley Group a route to drive extra sales, through targeted campaigns and systematic follow-ups. Sales reps are now supplied with iPads and smartphones loaded with the new CRM app, so they have the latest information to hand when they visit customers and prospects and can update their notes immediately.

**“The buy-in and adoption around the business has been excellent. We included our users from the outset in scoping what they wanted from CRM and in user testing and it’s really paid off.” David adds.**

**Previously, our approach was too broad. We didn’t get the direction we needed from our old consultants and the experience left us disillusioned. CRM is a big concept, but Xpeditio helped us focus on the right elements to have a big impact on our business. As the implementation rolls out, we’re continually seeing results that demonstrate this. Xpeditio has helped us get everything back on track.”**

David Linthwaite, Group IT Manager

### About Xpeditio

At Xpeditio we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We’re known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences, improving operational efficiency. At Xpeditio, we’ll show you the way.

Fast-track your journey to CRM success with Xpeditio.

+44 (0)20 7121 4705  
info@xpeditio.co.uk  
www.xpeditio.co.uk

46 Worship Street  
London  
EC2A 2EA