

Goodman Jones

Cloud-based opportunity management and accountancy service delivery with remote working.

Summary:

By investing in digital transformation last year, London-based firm Goodman Jones sustained accountancy business growth and served its clients more efficiently in challenging trading conditions.



Optimisation and unification of complex, high volume data



Business development and opportunity management



Integrated digital marketing



Seamless, real-time integration with core company systems



Workflow management with automated alerts



Customised for unique accountancy business needs

“Completely separately, we wanted to sort a workflow issue. Each partner had their own approach to managing client workflows. It was effective for each team in isolation but bringing processes and client details together in the wider business was difficult. We were potentially missing opportunities to develop accounts with further services we could offer.”

“We needed an efficient way to unify our contact management, communication and workflow across clients and departments.”

The solution:

Matt and his fellow Partners embarked on a search for a solution that would deliver a clear return on investment. They attended a Microsoft seminar where they learned about Microsoft Dynamics 365 and identified Xpedition as a suitable Gold Partner to approach. When the Goodman Jones team engaged with Xpedition to talk about the possibilities, it became clear that the operations side of the business also needed better digital support, which could provide an even greater return on investment.

“With the capabilities that Dynamics 365 in the Cloud and the Power Platform now offers, we are seeing digital transformation benefits empower accountancy firms to better withstand the competitive and disruptive pressures in the sector. Goodman Jones has successfully taken advantage of this capability to enhance and differentiate their client service and opportunity management.”

Ben Revill, Professional Services Business Manager, Xpedition

Matt Cooks confirms: “We could see that deploying Dynamics 365 to support both operations and CRM would improve the efficiency of our service and give us the customer management capabilities we needed. The Partners could see that this was a worthwhile investment, so we instructed Xpedition to go ahead.”

The project kicked off with Xpedition consultancy workshops to understand the business and infrastructure requirement and context. A detailed solution design was created, which was then reviewed and refined with Goodman Jones before beginning the implementation.

The results:

Working with Goodman Jones, Xpedition's team configured and deployed Dynamics 365 workflow management for business services, including returns for VAT, personal tax and corporation tax. The system tracks deadlines for each service, sending automated alerts as key dates approach.

Integration with Companies House enabled the update of company details automatically, including addresses and filing dates. Dynamics 365 also integrates in real-time with the Goodman Jones time and billing system, as well as their accounting and tax software.

Goodman Jones now commands a set of dashboards which make it easier to manage workload and priorities effectively, showing at a glance tasks and deadlines falling due and the outstanding actions to be taken.

To support business development, Dynamics 365 tracks and updates key relationships and new business opportunities, including contacts through referrals to and from third party organisations. There is one source of truth for all contacts and opportunities, with a consistent process for recording and reviewing client activity across the Goodman Jones practice.

The challenge:

Matt Cook, Partner at Goodman Jones, explains: “We have known for some time that we needed to invest in a proper marketing and CRM system. We had partners and directors going to events and meetings and making great connections, but it was hard to follow up and track them consistently when all the record-keeping was down to the individual. We had a lot of great client data, but it wasn't easy to use effectively. Our marketing and client communications weren't reaching the relevant contacts.”

Goodman Jones is a successful London based mid-market UK accountancy firm with a particular focus on owner-managed businesses. It employs 100 people. The firm supports entrepreneurs and family businesses across a significant number of sectors including professional services, property and construction, charities and social business, leisure and hospitality. The teams also work with international clients looking to invest in the UK.

Goodman Jones has strong customer-led values, valuing its trusted client relationships highly. To provide services efficiently and responsively, the firm is committed to technical excellence and business innovation.



The benefits:

With all client data now residing in Dynamics 365 in the cloud, time-consuming rekeying of information is a thing of the past. Partners and managers can enter information directly, as they gather it, wherever they are working.

The Dynamics 365 dashboards give a clear overview of vital operational information and accurate reporting, so Goodman Jones has true visibility of work in progress and can use automated alerts and reminders to ensure the team meets key deadlines, even when the workforce is dispersed. This saves time previously spent manually checking for dates and chasing up actions.

Integration with current systems is a key benefit for Goodman Jones. As Matt Cook says, "The easy integration with our key software including Outlook, Practice Management, Accounting and Tax as well as Companies House was a powerful convincer for Dynamics 365. We wanted one set of data and one solution to encompass all of our operations and business development, and that's what we now have."

"Marketing effectiveness has improved substantially, with our quarterly newsletter reaching many more of its target recipients. And for the first time, it's possible to see a pipeline of opportunities which we can address systematically, without missing any potential for new work."

The team can generate reports from the dashboard easily, providing a high-level view as well as more granular detail that shows clearly where deals exist and where action is needed.

It's now possible to prospect effectively. For example, Goodman Jones wanted to see which family business clients were not using private client services and vice versa, as they might be interested in other investment services. The firm augmented relevant client data in Dynamics 365 with third party data, from sources such as Companies House. They located the closest matches to their ideal investment client, identifying priorities for efficient and effective targeting.

"We were introduced to Xpeditio by Microsoft because of their reputation for improving CRM Systems and processes in accountancy firms. We had seen the potential of Dynamics 365 at a Microsoft event: Xpeditio is the partner we trust to understand our business and put the best features of Dynamics into practice to address our specific business challenges. The consultants really understood our sector and how to give us most value from the technology: their knowledge, communication skills and confidence were good to work with."

Matt Cook, Partner, Goodman Jones

About Xpeditio

With 20 years as a Microsoft Gold Partner and more than 630 successful Dynamics 365 projects delivered, Xpeditio is one of the UK's leading and trusted Microsoft Dynamics 365 implementation partners.

Whether you're looking to move to the cloud, implement a new business application, enhance your existing Dynamics 365 implementation, or need support, we're here to help businesses transform and grow.

To find out more about Xpeditio and how Microsoft Dynamics 365 can benefit your business, contact one of our experts today.

The future:

As Microsoft continually evolves Dynamics 365 and the Power Platform to anticipate and meet market demand, Goodman Jones has been able to further enhance their solution by integrating back-office data changes. The firm has adopted Microsoft Teams and SharePoint Online, opening up new possibilities for delivering both marketing and client work in an even more streamlined and responsive way, and to improve collaboration between teams. Using Microsoft's fully integrated suite of applications means all Goodman Jones' systems, data and communications are always connected, consistent and easy for users to adopt, with a familiar interface.



**Fast-track your journey
to CRM success with
Xpeditio.**

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