

Improving productivity and management reporting with Microsoft Dynamics CRM 2013 Online.

Burlington Group is a leading supplier of debt collection and enforcement solutions. They enable creditors to manage and recover outstanding liabilities in a compliant and effective manner.

In addition to their range of quality accreditations, Burlington are an award winning firm that has been recognised in their industry for their innovation, client satisfaction, responsible approach, adherence to regulatory best practice and systems performance. Working in many sectors, Burlington provides businesses, property owners and judgment creditors with effective debt collection and High Court Enforcement services. They have capabilities beyond those of most commercial debt collection agents.

They have 2 locations in the UK with a head office in London and an operations centre in Surrey. The business is made up of field based professional enforcement officers and there is an internal client services and account management team.

Burlington pride themselves on their high quality Account Management team who are a first point of contact for the client, and oversee the field based activities, executing the client's instructions.

The Business Challenge

The Burlington operations centre had a requirement for a CRM system following the introduction of a new internal sales team. Having invested significantly in an industry specific data provider, their objective was to maximise the use of this data through a quality CRM solution. This would enable them to contact 'claimants' and progress them to an instructed judgment.

Burlington had previously been using a Sage ACT! CRM system, but it was not fit for purpose as it was not capable of scaling to the level of business Burlington required.

The main frustration was an inability to easily create dashboard reports and monitor high volume sales call activity and results. This lack of reporting and poor visibility of operations was hampering their account management and their new business efforts.

Burlington's Managing Director, John Ingram commented: *"The old CRM system was just too slow and the right information was not quickly and easily available – and that does not motivate your staff! We needed a modern CRM solution to*

Client >

Burlington Group

Sector >

Business Services

Project >

Microsoft Dynamics CRM 2013 Online

ConsultCRM Excel Import Tool

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John Ingram >
Managing Director >
Burlington Group

Burlington Group

reflect the quality of our service, and provide our staff with an easy to use system that they can adapt to quickly with minimal training."

He added: *"It sounds obvious, but we needed a straightforward system where the users can quickly create tasks, phone calls and flag key reminders in order to call back prospects in a timely and efficient way."*

The solution

After careful review of the market, Burlington chose Microsoft Dynamics CRM Online for a number of reasons.

As a cloud based solution, Microsoft CRM Online removed all the headaches of trying to manage servers and back-ups internally, and provided 24/7 access from any location.

The solution was configured with tailored profile information to track companies, contacts and cases relating to the claimant and debtor process.

This included tailored user dashboards which means that each account manager now sees their own active cases, claimants and activities – all in a single view.

The management team dashboards show the instructed cases by sales person and additional key metrics on each sales person's performance.

Using Microsoft Dynamics CRM in conjunction with ConsultCRM's Excel Import Add-on Tool,

Burlington can now import all of their new data/ leads into the CRM system and distribute them across the sales team. This saves time and enables a fair distribution of data across the team.

John Ingram commented, *"ConsultCRM were just great; they listened carefully to our needs and configured Dynamics CRM exactly the way we needed, all in just 4 weeks! They also worked with Burlington's data provider to understand how it maps to the CRM system and their Excel Import Tool saved us a lot of headaches managing regular imports."*

Results and Benefits

The ease of use of Microsoft CRM Online and the single dashboard view for sales staff means that the internal teams can now spend more time on the phone driving business.

The Management team can now monitor all of the sales team's activities and new business wins. This allows them to concentrate effort where required and monitor the ROI.

John Ingram of Burlington concludes: *"The whole experience has been very positive. With the input from ConsultCRM, Microsoft CRM 2013 Online has helped the sales team increase their phone call output and this has resulted in an uplift in sales. It has brought us fully up to date with the most modern and effective CRM solution out there, and we now have a system that reflects the quality and efficiency of the service we provide to our clients."*

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Managing Director >
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