

Case study



Tudor Rose – The value of CRM in customer-centric publishing

CONTEXT

Tudor Rose is a publishing and marketing services company based in the UK. From customer magazines and book publishing to sales materials and e-media, Tudor Rose works with some of the world's best-known brands to turn their marketing vision into a reality. The company has a creative, intelligent and hardworking team that has a track record of delivering projects on time, within budget and above expectations.

When the business was formed 18 years ago, Tudor Rose managed customer records primarily using spreadsheets. However, its emphasis on great service quickly led to the company building its own system – an HTML front end sitting on SQL Server – in house.

While, for many years, the system proved a very good contact management solution, it wasn't a fully functioning customer relationship management system..

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 Jon Ingleton, Managing Director, Tudor Rose

THE CHALLENGE

Tudor Rose recognised – as so many businesses do – that to manage customer records primarily using spreadsheets was not going to serve them adequately, nor would it help meet their objectives to deliver better customer service, and to fuel and catalyse their expansion plans.

The HTML/SQL solution, developed and built in-house, served Tudor Rose better, and was adaptable, but still not what they needed. “This system went through numerous iterations as we added fields and functionality,” says Jon Ingleton, Tudor Rose’s managing director. “We were lucky enough to have the required skills to keep it going internally and it served us well.”

But it wasn’t CRM. “We needed something that could provide a more integrated view of the customer across business units and connect with other systems internally,” says Ingleton.

“High quality customer service is such a big part of what we do, so we wanted to use every advantage that technology has to offer to help us continue to make improvements across the entire customer experience.”

The solution had to support the company’s growth, both in terms of the depth of service that Tudor Rose wanted to offer, as well as the ever expanding number of customer accounts that it manages. Based on its understanding of the IT industry, Tudor Rose felt that Microsoft Dynamics CRM would best suit its needs, but it did evaluate other solutions before making a final decision.

“We’ve been publishing Microsoft customer magazines for 16 years and so many people in the business have got to know Microsoft Dynamics so well that it became a natural choice for us,” says Ingleton. “But we wanted to make sure that this familiarity wasn’t hiding a more appropriate system for our size and type of business. As a result, we explored a significant number of other options – both cross-industry systems and publishing-specific solutions.”

“Our corporate vision seeks growth from happy, motivated teams that work together productively... Against these metrics, we’re winning on all counts.”

Jon Ingleton, Managing Director, Tudor Rose

We needed flexibility in the CRM we chose

The first cutting of the long list was a relatively simple step. The publishing industry-specific solutions were either too prescriptive with their built-in processes or did not integrate seamlessly with other applications, such as Microsoft Outlook and Sage. Most also limited or even prevented customisation, and few could show a clear roadmap for product development. The shortlist then comprised just cross-industry candidates, including Dynamics CRM, Sage, Salesforce, Act and Maximizer.

“Our fear of a natural bias to Microsoft (given that they are our customer), led us to recruit the support of a local independent consultant to guide us through the review, shortlist, tender and test process,” says Ingleton. “To further ensure that we made the right choice, we gave ourselves six months for this phase. The clear winner at the end of our vigorous set of tests was Microsoft Dynamics CRM. As this process had involved people across all business units, we were happy that user acceptance and adoption would be trouble free.”

Once committed to Microsoft Dynamics CRM, the partner selection task was a fairly straightforward process. Microsoft Pinpoint provided Tudor Rose with a shortlist of four companies and they were all sent a request for proposal document that had been put together through the system selection phase. The partners then presented their offerings with a price, and Tudor Rose opted for the company that demonstrated the best knowledge of its requirements with a degree of thoroughness that gave it confidence in their ability to deliver. K3 proved the most suitable candidate.”



THE SOLUTION

Realising the full capabilities of CRM

The implementation itself followed an abbreviated version of the Microsoft project plan that is available on the Dynamics CRM site as part of their standard toolset. This plan breaks down the process into five clear steps: envisioning, planning, developing, deployment and improvement.

“K3 were magnificent – for their patience (we like to be thorough), their flexibility (we changed directions a couple of times) and their skills (they were faultless, and took us to a place beyond where we expected to reach),” says Ingleton.

At the moment, two teams are using the system fully and one team is half way through a transition. “Our adoption has been typically slow and thoughtful – we’re the tortoise in the race,” says Ingleton. “The key to realising the full capabilities of our new system is the data, and so we’ve taken care to get this right before we deploy each team.”

“The greatest compliment that we’ve had since we deployed was ‘I like it that you always seem to value my time,’” says Ingleton. “Now that our own processes and information sources have been streamlined, we suddenly seem much more efficient. If we continue to enjoy customer service improvements that are recognised by our customers, then we won’t need to focus on driving business growth ourselves; I hope that our customers will do it for us!”

BENEFITS

- Provides an integrated view of the customer across our business units and connects with other internal systems.
- Provides the technology to help Tudor Rose to make improvements across the entire customer experience.
- Supports the company’s growth in terms of depth of customer service offered and the management of an expanding number of customer accounts.
- Streamlined business processes and information sources.
- Improved efficiency
- Making Tudor Rose a more professional company enabling it to compete for business that our size would suggest we cannot win.



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About K3 CRM

Everyone at K3 CRM is driven by the same desire to create a lasting partnership where we help you realise the untapped potential within your organisation through our depth of expertise and personal approach.

Unlike other providers we bring you the best of both worlds: a specialised, agile and focused team of Microsoft Dynamics CRM experts together with the reassurance and backing of K3 a leading global supplier of integrated business systems and a member of Microsoft's Inner Circle and presidents club.

We take the time to understand you and your business first and foremost and quickly identify opportunities for early successes.

Whether your business is small, medium or large our principal objective remains the same: to work alongside you, with you and, ultimately, to bring technology and CRM to your business in the most suitable way for you to build your business.

If you are seeking an on-site, managed or hosted CRM solution; if you want to become more agile; if you want to harness social networks to broaden your customer service channels and become more responsive; if you want to make more of e-marketing; if you want to integrate CRM with your existing ERP package – K3 CRM can help you.

About K3

K3 is a UK Centre of Excellence for delivering solutions across a wide range of vertical sectors.

Over 600 customers rely on K3 to deliver powerful relationship management platforms across financial and professional services, manufacturing and retail.

With over 30 years of experience in development, implementation and support, K3 provides CRM in a number of flexible options including onsite, managed and hosted environments.

With more than 3000 customer installations in over 30 countries, K3 is recognised as a safe, innovative and reliable provider of world-class solutions, backed by world-class service.

**For an informal initial discussion on how K3 CRM can help you improve your business, please call contact us:
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