



IN DEPTH CASE STUDY

Mazars saves over 2,000 hours annually after implementing Sugar



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Mazars saves 2,000 hours

In the case of Mazars, one of the largest accounting firms in the UK, they have improved their efficiency to the tune of 2,000 recovered hours by eliminating repetitive data entry after deploying Sugar.

Challenge

Implement a business transformation platform that would create a single data entry point for client information, improve sales and client services, raise the integrity of business processing audit reports and enhance compliance documentation. Above all, Mazars needed to enhance user adoption of the CRM.

Solution

Mazars compared Salesforce, Microsoft Dynamics and Sugar. Total cost of ownership, extensibility and an intuitive user interface made Sugar Enterprise the most sensible and cost-effective fit. The business transformation platform is hosted on-site, with integrations to key business and risk-assessment applications.

Results

- Recovering 2,000 hours annually by eliminating repetitive data entry.
- Improving visibility of client information through Sugar's transparency.
- Enhancing audit trails.
- Automating compliance documentation processes.

With Symphony, it all adds up to value

Mazars was constrained by its old CRM. Because it was not widely used, it had minimal data upon which to draw. That made pipeline reporting unreliable and offered little actionable information for management. In addition, the old Mazars process required a manually-generated internal billing code for each new client in its finance system, which could potentially affect revenue as a result of the time taken to produce them.

"People used the CRM as little as possible, entering minimal amounts of client information, so the value of the system was not evident," says Alison Clack, the Mazars director of business transformation who guided the transition to Sugar.

The first step in introducing Sugar to UK users focused on quick wins that created buy-in and delivered visible benefits.

"We had to show our professionals that there was value in this new CRM, that it could enhance sales opportunities," Alison says. "We kept the on-boarding journey as simple as we could: qualifying, proposing, closed, won/lost."

Improving those initial data points enhanced pipeline visibility, leading to more accurate financial projections and reports. Sugar's transparency enabled more people to see real-time customer information.

Getting a bigger, better picture

With the new CRM gaining traction, the Mazars implementation team customized the workflow process to integrate risk assessment and other processes. Suddenly, the company was saving more than 200 hours per month on process automation in finance and seeing a clearer picture of its SLAs.

“Each step is taking us closer to our goal of creating an optimum straight through process,” says Alison.

For example, Sugar enhanced the revenue cycle by enabling billing codes to be generated within minutes of a request. It also allowed Mazars to create unified processes and centrally store and manage documentation, which facilitates internal audits and regulatory compliance. Overall, data quality has improved.

A Bright CRM Future

Mazars has come miles from its old days, but Alison’s sees more opportunities ahead.

“We’re still helping our professionals understand Sugar’s value in regards to the Customer Journey,” Alison says. “But we are getting there, and I know we have the right platform.”

Working with Symphony

In implementing the best solution to address its needs, Mazars worked closely with its partner Symphony, a company that partners with accountants, consultants and other professional services firms to help IT systems work better together.

Symphony already had a close relationship with Mazars, providing them with its “Advance Practice Management” system. Symphony is also an OEM partner of SugarCRM, so when Mazars decided to invest in Sugar it meant that they had two strong relationships they could rely on to drive the success on the implementation.

About Mazars

The tenth-largest company in the UK, Mazars is a professional services firm that specializes in audit, advisory, accounting and tax services. The company employs more than 17,000 professionals globally, maintains operations in 77 countries, and has more than 1,600 partners in 20 offices around the world.

“Each step is taking us closer to our goal of creating an optimum straight through process.”

Sarah Wheeler, CRM & Marketing Manager - Mazars



About Symphony - APS

At Symphony we are relentless in our pursuit for new methods that transform Accounting Firms and their Clients

We aim to see the whole picture. We analyse, we work to understand all the issues that are holding you back.

Since 1999 Symphony has been partnering with Accounting Firms, initially in practice management software solutions and then CRM in 2012. Overtime we have evolved to develop holistic, across-platforms expertise. It's a best of both worlds capability – mixing application software and technical disciplines with a consultative capacity to strategise for overall company systems.

When a firm's systems are truly integrated and access is easy across the organisation, teams have the means and freedom to build their all-important client relationships.

Technology Deployed

SugarCRM
SymConnect – Integration Platform
SymphonyBPA - Automation
Symphony – TimeCapcha

Integrated to

Advance Practice Management
Advance Practice IQ
Success Factors

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