

# DMC Case Study:

## Lloyds TSB Commercial Finance



Business Growth Solutions

**Product: Sage SalesLogix CRM Advanced    Number of Seats: 420**

**Lloyds TSB Commercial Finance (LTBCF) is the international commercial finance arm of Lloyds TSB with offices in the UK, France, Germany and the USA. Like every business in the financial sector, it works in a dynamic, competitive market where innovation and change are continuous.**

### What was the challenge?

Following re-organisation of the bank in 2002, LTBCF found itself with a growing portfolio of finance products. In addition to its traditional asset-based lending business, LTBCF became responsible for the bank's commercial hire purchase and leasing operations. The expanded responsibility meant restructuring the sales operation and the IT systems to support it. By integrating its sales effort it could not only save on support costs, it could open up new opportunities for cross-selling products:



"The strategy was to go for a 'one brand' approach - a one-stop shop for commercial finance," says Tim Evans, project manager at LTBCF. "But we had lots of different sales teams with different behaviors and support systems and we wanted to bring it all together under a single contact management system." LTBCF, of course, had systems from earlier developments, including a mainframe-based business intelligence system. But it wanted to rationalise IT support across the whole sales operation. Evans explains: "We wanted to create a core contact system, which brought the HP and leasing operations together with the asset-based lending management, and roll it out across all the sales teams."

### The Search for a Solution

The search for suitable software began in 2004. Evans says that LTBCF looked at several possible solutions and recognised that all of them would involve an element of bespoke development. "We knew whatever package we chose, it would have to be extended. We needed to capture all of the business processes involved and we wanted to integrate with other referral mechanisms like the website. We looked at a number of packages such as Goldmine - but eventually settled on Sage's SalesLogix with customisation by DMC Software."

### The DMC Solution

Part of the DMC Group, DMC Software Solutions is one of Sage's key resellers. It has received several awards including ACT! business partner of the year from 2002 through 2007. Its success as a reseller lies in its specialist background in customer relationship management (CRM) solutions. Unusually for the head of an IT company, Ramsay comes from a sales background and sees this as a clear advantage when dealing with customers: "I am not a technologist – I can employ people to do that. I am sales driven first and foremost and look at our customers' business needs from that point of view."

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Early in 2004, Evans and his team at LTBCF sat down with DMC's consultants to work out how SalesLogix could be adapted to suit its requirements - including integration of the HP and leasing operations. The development team not only included DMC consultants and staff from LTBCF's IT department, it also brought user representatives: "We called them business ambassadors - from sales and management. We involved them from the very beginning to ensure we were always on the right track," says Evans. "It was an extremely tight deadline because we wanted put the first phase in October 2004. It demanded a very focused effort from DMC and LTBCF."

As if the challenge of the tight October deadline was not enough, LTBCF changed the order in which the new software was to be phased in: "To a certain extent, tight time frames demand that you build according to customer needs as you go along. It is an iterative process. We decided to bring the HP and leasing system forward and implement it first. DMC had to build a new module to extend SalesLogix," Evans says.

Despite the changes and the fast approaching deadline, the first phase was ready on time: "On October 1st 2004 we delivered the critical functionality for the launch of the system and the first part of HP and leasing system. We then rolled out the second part of HP and leasing to 100 users in batches," says Evans. By May 2005, LTBCF had begun to roll out phase two, which includes Sage integrated sales contact management software and will bring a further 170 users on to the system. "We have pulled together the overall requirements now and see no problems," Evans says.

### The DMC Value

Evans is full of praise for DMC's contribution to the success of the project: "DMC took a professional consultancy approach and worked alongside us. They quickly understood our business and, right from the start, they could see where we were coming from. They showed us how we extend the scope of SalesLogix to do what we wanted," says Evans. Ramsay of DMC puts much of the success down to DMC's business-oriented approach: "The point is that CRM is a culture - not a piece of software. CRM is about getting the business processes and disciplines in place. Making this work is central to what we do."

**To find out more call us free on 0800 652 2423**

*DMC Software is one of the UK's leading Sage Business Partners. Specialising in CRM, Accountancy Software and fully integrated business suites, DMC Software can provide the software to quickly improve your business efficiency. DMC has won numerous customer service awards including the ACT! business partner of the year (2002-2007) and the SalesLogix business partner of the year. DMC is part of the Sage Circle of Excellence.*