

## BDO

### Professional Services Case Study

*"To win a client you have to respond quickly. We needed to deliver client engagement with integrity because it is embedded into the way we operate. CRM did this for us."*

**Mark Sykes, Partner, National Head of BDO Drive UK**



BDO is a global accountancy and business advisory firm, active in 154 countries with 64,500 people working out of 1,400 offices worldwide. The firm's UK arm has a staff of 3,500 and provides tax, audit and assurance, advisory, and business outsourcing services to companies across all sectors of the economy.

Its BDO Drive solution provides outsourced accountancy services "underpinned by the latest cloud technology."

#### What did BDO want to achieve?

With BDO Drive growing quickly, they faced challenges around how to scale the business while delivering a consistent level of client service. They needed a system that would help manage the full client lifecycle, from lead to opportunity to client, as well as improve visibility over staff and resources for better project planning.

Mark and his team consulted all areas of their business to understand the organizational needs. BDO worked with Fullscope to then identify the key business outcomes that they wanted to achieve with CRM.

#### BDO's Top 3 Business Outcomes

1. Improve the operational efficiencies in the organisation to ensure that communications are going quickly from one person to the next person to drive client service.
2. The second outcome was around lead generation, they needed CRM to provide visibility of client information to be able to have the right conversations to generate leads.
3. Generate opportunities from existing clients. BDO wanted to be engaging in proper business conversations to cross sell services and improve client service.

#### About Fullscope

Edgewater Fullscope delivers innovative Microsoft ERP, CRM, BI and digital solutions and services on premise or in the cloud to companies in North America and the UK. The award-winning company is one of the largest resellers of Microsoft Dynamics 365 (formerly Dynamics AX and CRM). We also offer strategic consulting delivering a blend of classic and product-based consulting services that help clients reduce costs, improve processes and increase revenue through the judicious use of technology.