Sage CRM

Success Story

Dixon Advisory chooses Sage CRM and Sage 300 ERP for Relationship and Business Process Management

Challenge

Small business solutions and multiple databases were no longer capable of meeting all of Dixon Advisory's needs.

Solution

Sage CRM had the capacity, document management, workflow capabilities, and seamless integration into financial software solution, Sage 300 ERP that Dixon Advisory was looking for.

Result

Sage CRM has become Dixon Advisory's repository for all client information. It has taken on the role of document management system, workflow engine and CRM.

Customer
Dixon Advisory

Industry
Financial Services

Location
Multiple locations across Australia

System
Sage CRM and Sage 300 ERP

Sage Business Partner
Accsys Consulting

Dixon Advisory is one of Australia's leading independently owned financial advisory firms. Established in 1986, the organisation spent its first 15 years developing a small but loyal client base and a solid business foundation. In early 2000 management change saw Dixon Advisory embark upon a dramatic expansion strategy built around the delivery of family and self-managed superannuation services, financial planning, property and mortgage advice, estate planning and other related services. Within 12 years the company grew from three people to more than 350 employees.

Today, Dixon Advisory boasts a client base of more than 15,000 families with a combined asset base in excess of $4 billion. The firm has offices in Canberra, North Sydney, Melbourne and on Queensland's Fraser Coast. Following the establishment a few years ago of a strategic property investment listed Australian company, Dixon Advisory also maintains an international office in New Jersey, USA. All offices are connected via a private network.

Adapting to growth

Dixon Advisory is a company of two distinct phases. There's the pre-2000 organisation with three employees and there's the turn-of-the-century firm that has powered ahead. The earlier version required cost-effective yet professional support tools and systems suitable for a small business. Key among these were multiple Sage ACT! contact management databases and a small business finance package.

As Dixon Advisory grew, the directors were focused on ensuring that the personalised service levels provided to clients were not diminished by a larger firm – a client today receives the exact service model they did prior to 2000 (in fact now that Dixon has established economies of scale, clients receive even more personalised attention than in the past).

As client numbers and business complexity grew however, the small business solutions were no longer capable of meeting all of Dixon Advisory's needs. Client relationships were the backbone of the firm's business, yet with numerous databases, there was no easy way to achieve a single view of the customer or to quickly understand all recent interactions.

Andrew McPhillips, Director, Chief Technology Officer at Dixon Advisory explains, "As we started to get to 100 employees we found we had multiple people dealing with a client at any

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Andrew McPhillips,
Chief Technology Officer,
Dixon Advisory

point in time across different services. To avoid duplication or inconsistencies with client communication, we needed an enterprise-grade CRM [customer relationship management] solution, one that would provide a central place for all client contact information, correspondence and documentation."

A Sage decision

McPhillips began researching alternative CRM solutions. Out of all the options, one solution stood out: Sage CRM. Available through the cloud or for deployment as a traditional in-house solution, Sage CRM had the capacity, document management and workflow capabilities that Dixon Advisory needed.

"It was a good fit," McPhillips admits. "Cloud was very new and scary at the time so we adopted the on-premise model. The ability to build in workflows was a big attraction. Plus we were at a stage where we needed to upgrade our document management system. When we looked at the Sage CRM document management functionality, we realised it could manage 95 per cent of what we needed without the need for us to invest in a separate piece of software."

Other draw cards included a foundation of SQL Server, a technology that was already familiar for McPhillips' team, and a web front-end which ensured the application would be easily accessible from all offices.

Building on a common base

With the help of Accsys Consulting, a local consulting firm and Sage business partner, the CRM solution was designed and developed. Workflows were created to automate common processes. Several million documents associated with client records were imported from the previous document management system and have been scanned in since, and filed in the system. Over time Sage CRM has become Dixon Advisory's repository for all client information. It has taken on the role of document management system, workflow engine and CRM.

CommuniGator, an integrated, third party email marketing solution has been added, enabling the company to become more proactive in its client communications. Email updates on hot topics or legislative changes can be sent quickly and easily to affected clients. Clients can be identified by any number of categories including services, products, financial interests, family status, industry and so on. This makes it simple to create far more targeted, highly relevant communications.

"The software gives us the flexibility to handle all these kinds of needs and to get emails out fairly quickly to groups of people. We'd use CommuniGator and Sage CRM a few times a day for subsets of clients," McPhillips says. "Most clients receive an email from us every couple of weeks and all emails are recorded as part of our document management. Crucially, we can now control the amount of communication to our clients – having a great system is one thing but if we continually bombard our clients with multiple communications that could be combined, the system loses its effectiveness very quickly."

When Dixon Advisory decided to upgrade its finance software, it chose Sage 300 ERP, an enterprise resource planning software solution that could integrate with the CRM, thereby streamlining data flows and maintaining client visibility across the organisation. Similarly, when it was time to invest in payroll and human resources (HR) software, consistency was maintained through the selection of Sage MicrOpay and Connex, an integrated HR self-service portal.

"Integration between CRM and Sage 300 ERP is important to us because we pull data from Sage CRM into Sage 300 ERP for all our client billing and having the two systems side by side provides the least intrusive and most integrated service to our clients. It made sense to have two systems that talk to each other out of the box," McPhillips smiles.

Accsys Consulting has continued to work with Dixon Advisory, providing advice, design and deployment assistance with each new system. "Accsys Consulting has certainly been there for us throughout the journey. They've provided good continuity with the individuals that do the work for us. Their level of support has been quite high. On any system this big you do need a fair degree of customisation and configuration, and Accsys Consulting has always been there to help us," McPhillips notes.

IT that matches the business needs

Dixon Advisory's comprehensive overhaul of IT systems during the past few years has been no small feat, but the effort and investment is paying off as the company now has software systems capable of supporting current and projected business needs.

McPhillips says, "For our advisers, all the client information can be found in one spot. They can see all areas of the business. We've managed to reduce duplication and inconsistencies by getting rid of multiple client databases. The CRM helps us to respect the client, be consistent with our messages and ensures we remain cognisant of what the client wants. Without a system like Sage, it would be difficult to achieve this. We'd have disorganised chaos."

With much of the initial hard work now complete, McPhillips says development of new workflows is a key priority. "We've learned to use workflows to facilitate rather than hinder by being too dogmatic. The best workflows are where we can build in some logic so that the computer does the work, freeing our people from manual and tedious activities to focus on what they are paid to do, which is talk to our clients without being encumbered by undue processes. One of our main focuses is to use the systems we've got to achieve efficiency gains, thereby being able to provide more services to our clients without needing to charge more," he concludes.

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