

As a leading UK asset based lender, Lloyds TSB Commercial Finance assists businesses from start-up to multi-national by providing a range of services, including factoring, invoice discounting, debtor protection and hire purchase. But with over one thousand people based across the UK, the company was finding it difficult to share information amongst its large sales team.



### Their challenge

“Frequently the left hand didn’t know what the right hand was doing,” according to Charles Brown, Senior Consultant at Lloyds TSB Commercial Finance, “we had all the classic problems, we struggled to really know what was going on, salespeople couldn’t easily share information, and we couldn’t identify which market spaces were being addressed. We therefore instigated a project to look at implementing a companywide CRM solution.”

### Our solution

Having identified the main mid market players, Lloyds chose SalesLogix from Sage. “There were a number of key factors behind the decision,” Charles explains. “Firstly SalesLogix is backed by Sage. It’s important for us that any supplier

we chose wasn’t going to disappear overnight; we need someone with long term strength and stability.

We also liked the way the product looked and found it easy to use. It wasn’t too complicated, unlike the competition.”

Also important was the upgrade path, which means that Lloyds can easily take advantage of new capabilities as they become available. Finally, and very importantly, the price was right. “SalesLogix offered the cost base we were looking for so we approached Sage who put us in touch with DMC, one of their business partners, who” says Charles, “has been looking after us ever since.”

Charles is full of praise for DMC. “They have built a really good relationship with us.

**“SalesLogix has allowed us to create a repository of information that we simply didn’t have before. It’s companywide, consistent, and serves as the primary source for our sales BI reporting.”**

Charles Brown, Senior Consultant,  
Lloyds TSB Commercial Finance

They have put their own development teams in house and at every stage of the process they have bent over backwards to help make sure that the whole project worked."

Originally looking purely for a CRM solution, once selected Lloyds found that the project scope increased, and the team found themselves having to come up with a solution for the HP & Leasing arm of the business. "They were about to lose the systems they were using and we had a very small window to get them a new solution." says Charles, "We felt that, because of the degree of customisation possible in SalesLogix, it was ideal for them."

"We went from zero to a fully working and operational system for HP and Leasing in 6 months," explains Charles, "and in the first month of operation we turned over a record number of deals through the system, so it worked very well." While it proved challenging and was, according to Charles, "a very, very hard project to work on and deliver on" DMC stepped up to the mark. Working with Lloyds own staff, they

delivered a very successful project and implementation, which is still the main new business processing system for HP & Leasing.

"It's allowed our sales team to build deals online," says Charles, "deals can be underwritten online, all the decision notification is done online, all the electronic document packs are fulfilled online and it's all driven by workflow so that the process is very clear to everybody. Put simply, people like it and it works."

### The future

The key benefit SalesLogix delivers, according to Charles, is information. "It's the thing that has really moved us on. The challenge was always to get people to use a CRM system properly, but now we're getting the kind of information we've always wanted coming out of the back end, people can see the true value of putting the information in at the front end."

SalesLogix has given Lloyds the ability to analyse sales data, work in progress, and the sales pipeline, while also delivering trend and loss analysis. "Everything is available at the flick of a switch," according to Charles, "and we can share it easily around the organisation. It's made something that was very difficult, very easy."

And having gained so many benefits from implementing Sage SalesLogix, Lloyds are looking at ways in which it can gain even more from the product. "Now that the business understands what SalesLogix can do for us, people are starting to ask more of it," says Charles, "they are very interested in improving integration with MS Outlook calendars, so now we're looking at Mobile SalesLogix. We have standardised on Blackberries as our handheld platform, and having seen the latest version it looks like the kind of thing the sales team are currently demanding, so that's the next step for us."



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