A business consultancy – before digital transformation

This fictional **service** business provides business consultancy – it operates a typically inefficient system and is therefore perfect for digital transformation.

Pre-Sales

- The business finds its work through the company website, local referral network, networking, word of mouth, press releases and adverts through Google.
- Leads are **manually** added to a **spreadsheet** and processed/followed up as they arrive.
- Quotes and presentations are **manually** created in **PowerPoint** and presented to potential customers.
- Leads are followed up by **phone** or **email** (but not recorded on the spreadsheet).

Post-sales

- If a quote is approved, contracts are **manually** created and **emailed** to the customer.
- The enquiry is marked as 'won' in the **spreadsheet** – no other information is recorded.
- Invoices are **manually** created in the accounts package and **manually emailed** to the customer.

Delivery

- Project **delivery** is managed through another **spreadsheet**, mapping out delivery dates and resource planning.
- Projects are delivered, but no one has 'live' visibility of a project's **progress**.
- Once complete, each job is closed, and final invoices are **manually emailed** to the customer.
- Another **spreadsheet** is updated to check on the sales and delivery teams' performance so directors can see if the job made any **money** – the accuracy of the data is questionable.

For a business wanting to **scale,** or **improve** the **value** of each job, the following challenges are barriers to their efficiency and growth:

- The lack of real-time management information means it's unclear which channels are working – **money** and **time** are wasted on less productive methods.
- The inability to analyse data means it's unclear why some jobs aren't being converted – the **conversion rate** cannot be addressed without the data and systems to analyse.
- Manual creation of contracts and invoices is time consuming, inefficient and could easily be automated.
- With no data to capture how much time is being spent on project delivery, it is difficult to assess whether a job is **profitable**.
- Each job takes around 4 hours to manually add – workflow is disjointed and admin-heavy.

<u>But let's reimagine this business after our specialist team at Sapere has taken it through a digital transformation project.</u>

Digitising this business would involve the creation or adoption of a number of intuitive, innovative **software** solutions. Some would be bespoke, but all would fully integrate with current software to create a perfectly seamless, streamlined workflow solution.

- An intuitive **CRM** would transform the efficiency of workflow, driving growth by managing spend and conversion rates of all **leads** and **customers**.
- Contract creation would be automated and integration with the accounts package would allow all quotes, contracts and invoices to be sent automatically by a **Mandrill** type email service.
- Adopting and integrating a **project management suite** would allow the business to track project delivery in real-time. A reporting suite within the CRM would enable real-time reporting – perfect for **strategic decision-making**, predicting trends and allocating resources to the areas that offer the greatest return.
- An automated, streamlined workflow dramatically increases efficiency and productivity, removing the laborious, **manual** effort needed to process and manage each job. This allows the true costs of a job to be measured.

As specialist digital transformation partners to businesses right across the North East, we have worked with a huge range of industries – from heavy industry, leisure and finance to oil and gas, pharmaceuticals and healthcare. Ultimately, we give you the confidence to reimagine your business, integrating the very best digital technology so that you can modernise, leap forward and grow.

This is a great example of a digital transformation project. If you'd like to chat through your own project in detail, please just get in touch with a member of our Sapere team – we're jargon-free and here to help.

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