

# CPL Group embark on new CRM journey with the support of Circyl

Circyl   
CASE STUDY



**CPL GROUP**

**If you don't begin your CRM journey soon, you risk being left behind. A simple message, but one appreciated by our client, CPL Group, who realised that if they did not embrace digital transformation to help drive their business forward, they could fall behind in the levels of service delivered to their members.**

With a history of delivering high quality procurement services, CPL Group has built a strong reputation as procurement specialists offering market leading frameworks in education to its 7000+ members as well as best in class procurement consultancy to both the education and wider public sectors.

CPL Group comprises three not for profit institutions that are owned by the education sector. Tenet Education Services (TES) and Tenet Procurement Services (TPS) offers enhanced services including procurement consultancy to the education and wider public sectors, while the CPC provides a range of EU compliant Frameworks, alongside procurement advice and training to its members

Of course, with a client-base consisting largely of high-profile education establishments, it's crucial that CPL Group harness the data moving around their business, using these insights to enhance the customer experience.

With a basic idea of what they wanted their CRM solution to achieve, the charity felt now was the time to embark on a new CRM journey that would deliver long-term operational benefits and offer greater value to clients.

- CPL Group wanted to update their outdated legacy CRM and spreadsheet solution, as it was negatively impacting operational efficiency
- They required a solution that would give them an 'at a glance' view of their data, while harnessing the information moving around the business
- Circyl delivered a business transformation project, providing CPL Group with tools needed to streamline important business process, like invoicing and lead generation
- Through an ongoing collaboration, Circyl will continue to support CPL Group as they adjust to the new solution, ensuring it is regularly updated where necessary

*"Instead of manually looking through spreadsheets, we required a solution that would automate the flow of data throughout the business, giving employees access to insights in real-time. The Circyl team has been extremely supportive throughout the deployment process and I'm confident we now have a system in place that will help us deliver greater value to our growing number of members and customers."*

**- Joshua Wood**  
IT Officer, CPL Group

## Change of direction

Previously, CPL Group had been relying on Dynamics 2011 for their CRM solution, and although it had served its purpose well during the early years, it was no longer sophisticated enough to manipulate the data collected.

All technology has an expiry date, and the existing solution had reached this point, becoming difficult for employees to use effectively and requiring them to manually trawl through spreadsheets in order to find the relevant information.

Ultimately, the existing system, which was expected to streamline important business processes, had become inefficient, slowing operations down and preventing colleagues from freely sharing and accessing insights.

Although CPL Group didn't have a specific alternative in mind, they had a good understanding of what they didn't want from the new CRM solution, having experienced working with limited functionality on the previous system.

Instead of adopting a straightforward customer and supplier relationship, Circyl and CPL Group formed a working collaboration that laid the foundations for an evolving journey to deliver a modern and flexible CRM solution.

## Streamlining important processes

After taking the time to understand the culture and requirements of CPL Group, it was agreed that the business transformation project would be an ongoing process, rather than a one-time installation, so it could be constantly updated.

The business' new CRM solution would take data from the website, harnessing this information to uncover important insights about their customers, so they could spot business-enhancing trends early on.

With one of the biggest complaints of the previous system being that it was difficult and time-consuming to use, the new solution would offer an 'at a glance' view of the data, displaying information clearly in one interactive interface.

Since the project, lead generation has been highlighted as one of the most noticeable improvements, as the solution is now open to all employees, allowing leads and records to be shared across the business with ease.

Invoicing is another key area of improvement, as the auto generate tool can be used to streamline the entire process, making the report compilation quicker and more efficient moving forward.

From a cultural perspective, CPL Group has recognised a positive change in attitudes towards the technology, as employees who had lost faith in the previous system are now engaging with the new one, proactively identifying business opportunities.

Through a flexible and transparent working relationship, the Circyl team were in constant contact with CPL Group, guiding and steering them through the process, to ensure they extract maximum value from the new system.

## The hardest part is getting started...

For many businesses, the thought of updating systems that employees have been comfortable using for many years can be daunting, especially if they're entering uncharted territory and it can lead to outdated systems and processes continuing to be used well beyond their shelf-life.

However, by choosing to ignore existing problems because of the short-term growing pains addressing them might cause, could put you at risk of falling behind competitors, who have already started down the road to becoming data-driven businesses.

*"CPL Group's existing CRM solution had become outdated, and they needed a modern and flexible alternative that would improve operational efficiency within the business. Building a close working relationship with CPL Group, we took the time to understand the needs of the business and install a system that would deliver long-term value in terms of data collection and analysis."*

**Andrew Morgans**  
Technical Director, Circyl

For CPL Group, the hardest part of implementing a new CRM solution was actually deciding to take the plunge. This is a common issue, as many businesses say they plan on looking into it 'soon', but that day never quite arrives and years later they're still stuck with the same outdated solution.

The beauty of business transformation projects, which CPL Group discovered, is that they are never fully complete. The flexibility of the solution means it can be updated and changed over time, so you'll always have access to a system that satisfies your business needs.

Now, with a seamless and automated flow of information running through all teams and arms of their business, CPL Group can continue delivering high-quality results to clients, without the internal headaches to go with it.



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