



BKL

People-focused accountancy firm integrates digital marketing with Dynamics for market-leading engagement and responsiveness

Summary:



Integrated digital marketing, business development and client on-boarding platform



Customised for unique accountancy business needs



Compliant, auditable processes for GDPR and sector regulation



Optimisation of complex, high volume data and configuration



Trusted, ongoing system support

The Challenge:

Making best use of existing client data

BKL is one of the UK's top 50 accountancy firms. Employing over 190 people, BKL supports entrepreneurs, high net worth individuals, family offices, freelancers and growing businesses. BKL recognises that people matter most and is committed to making a difference to the lives of its people, clients and communities.

With lots of change happening in the accountancy sector, larger firms are providing self-service through automation as an affordable alternative to traditional accountancy services. This helps firms meet straightforward needs, such as tax returns. Ultimately, effective client engagement and ongoing relationship management is key to retaining clients.

As a progressive and people-focused firm, BKL identified a strategic need to optimise its marketing and promotion, ensuring clients and prospects are informed about how BKL's accountancy services provide a responsive approach to continually meet their particular needs.

The Opportunity:

Integration and enhancement

The BKL team engaged Xpeditio for two reasons: to provide ongoing support to their complex existing CRM solution, and to design and deploy an effective digital marketing platform to work with it.

BKL already held a great deal of client data, acquired through on-boarding and KYC (know your client) process. BKL had a well-established Dynamics system in place. Highly customised, it had over 100 fields of data integration with the existing Practice Management System.

The project began with Xpeditio consultancy workshops to understand the business and infrastructure requirement and context. We created a detailed design of the necessary enhancements and extensions. As part of the support package, we redesigned and optimised existing integrations and configuration, to provide clean, dependable data that was compatible with the new digital marketing platform, ClickDimensions. We then configured and tested the system, with a successful 'go live' in September 2017.

“We approached Xpeditio because of their reputation for improving CRM systems, specialist digital marketing expertise and strong support of their own clients.”

Simon Bussell, Director of Marketing and Business Development, BKL

“We are seeing digital transformation benefits empower accountancy firms to better withstand the competitive and disruptive pressures in the sector at present.”

Ben Revill, Professional Services Business Manager, Xpeditio

Simon Bussell, Director of Marketing and Business Development, BKL

“With so many third party integrations to our existing system, this was a complex technical project too. Xpeditio’s specialists showed where the problems were, gathered info from third party providers and resolved these problems. This gave us reliable data and inputs from every side, so our new digital marketing platform makes full use of all our data.”



The Solution:

Sophisticated, needs-focused targeting from trusted data

Working together to define the digital marketing solution, we revealed some important principles to underpin the effectiveness of BKL’s future marketing campaigns. For example, individual contacts have different roles and accountancy requirements depending on whether they’re acting as a representative of a company, or as a private individual.

We changed BKL’s system so it showed these different contexts and the accumulated value of each client across their roles. In turn, this means that BKL can communicate with specific clients about the most relevant services and topics that match their most likely current need.

“We enjoy working with Xpeditio. They are accommodating and flexible; their support, including bi-weekly reviews, is thorough and reliable.”

Simon Bussell, Director of Marketing and Business Development, BKL

The Future:

Truly customised client marketing

BKL has transformed its competitive marketing capability, now that it can create accurate marketing lists and reach the right people with different messages to suit their needs and preferences. The CRM enhancements and new platform also give BKL a full audit trail with GDPR-compliant opt-ins and well controlled personal contact data.

“They’ve helped us stabilise our existing system and provided invaluable advice on our digital marketing, a critical element of BKL’s strategy. They did all this on time and under budget too. We are delighted!”

Simon Bussell, Director of Marketing and Business Development, BKL

About Xpeditio

At Xpeditio we guide your path to growth, through the implementation of intelligent cloud-based business applications. We help our clients to understand how technology can empower their business in real terms, and we deliver.

Previously known as TouchstoneCRM, we offer so much more than CRM and business software. We deliver real business value through expert consultancy. We’re known for our questioning nature and for challenging the status quo.

We succeed when you succeed, inspiring clients with insight led guidance. Our market leading expertise and industry knowledge will help your business to reach its goals.

We understand your industry. Our experts are passionate about sharing their knowledge, revitalising client experiences, improving operational efficiency. At Xpeditio, we’ll show you the way.

Fast-track your journey to CRM success with Xpeditio.

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