Case Study: Robertson Group

Robertson is one of the UK's largest independently owned construction, infrastructure and support services companies. Robertson turned to m-hance when looking for a Cloud based CRM solution that would bring the combined knowledge of staff in different departments, companies and locations together. The company was also looking for a solution that had the capacity to grow with the business and the potential to scale up as it continues to win new business and broaden its capabilities and offerings.

Customer Challenges

- Cohesive working between staff and colleagues in different offices and departments.

- Finding an all-round CRM solution that was specifically designed for winning work within the construction and FM sector.

- The ability to scale up during busier periods and having a solution that supports short-term and long-term growth.

- The task of locating data and information across different departments and divisions was difficult and time-consuming.

- Providing better insight on clients, suppliers, divisions and projects.

- Finding the right implementation partner that understood the unique challenges Robertson faced.

m~hance
with you all the way

Case Study: Robertson Group

"With Build 365 we can now find relevant data in one place rather than having to make phone calls and sending many emails, meaning we can react quicker."

Calum MacPherson, Director of Private Sector Relationships, Robertson Group.

The Solution

- The solution deployed at Robertson is m-hance's Build 365 - a CRM solution based on the Microsoft Dynamics 365 platform, designed for the specific needs of the construction sector.

- Build 365 is a flexible, scalable solution that allows construction companies to better manage bid pipeline and its relationships with client contacts and influencers.

- Fully integrated with Microsoft Office 365 and productivity tools such as Outlook and Power BI, the solution can be deployed in the Cloud and on Premise.

Customer Success

- Cost-savings - an estimated £115,000 saving in staff time since the new solution went live in August 2016, due to improved access to a single data point and automated reporting on business development and work winning activities.

- Staff members are less siloed across departments, divisions and office locations.

- Increased productivity and connectivity of workforce through better management of intermediary relationships.

- Better insight into clients and improved visibility of key contacts and influencers across all business units, sectors and geographies. Especially useful for larger key clients with multiple touch points across the business.

- The ability to accurately view, quantify and interrogate a long-lead project pipeline for the first time.

- Increased utilisation of resources due to enhanced visibility of internal company pipeline and internal and external supply chain.

- Improved market intelligence and data analysis and presentation of data using Microsoft Power BI tools.

m~hance
with you all the way