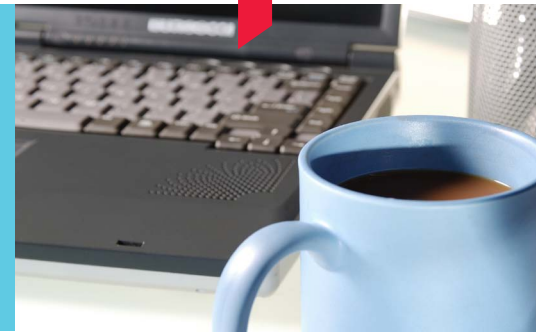


# CASE STUDY – THE WILLIAMSON GROUP



## The organization

The Williamson Group (TWG) is a privately-owned Canadian company that provides insurance benefits consulting for clients throughout Ontario. It negotiates with insurance carriers, such as Great West Life and Sun Life, to obtain the best combination of options and pricing, and then presents that solution to its clients or prospects. The company also offers individual investment and insurance products.

TWG had two existing customized Goldmine databases to keep track of its clients, and to organize and track communications through emails, phone calls, appointments and tasks. Since there was one database for corporate clients and one for individual clients, it was unable to centralize histories of communications and some data was duplicated.

## The challenge

TWG had many executive staff members who worked collaboratively on their customers' cases, much of which was completed remotely. The key problems were:

- No integration between Goldmine and Microsoft Outlook
- No integration between Goldmine and BlackBerry devices
- No integration between Goldmine and ERP system (Great Plains)
- Manual Excel spreadsheets for tracking prospects
- Inability to use Microsoft Outlook appointment invitations functionality
- Duplication of data
- Massive quantities of documents were currently stored on TWG servers, which made locating these documents time-consuming and difficult
- Several key processes at TWG required manual creation of tasks

## Why Microsoft Dynamics CRM

BDO was chosen to implement the new system based on its extensive experience with Project Management and operational change, along with our strong productivity skills and efficiency

improvements. In addition, BDO had previously implemented Microsoft Dynamics Great Plains at TWG. We suggested CRM to address the company's requirements for the following reasons:

### Integration with existing Microsoft products

- TWG used Microsoft Office extensively and needed a CRM solution that would integrate tightly with it, along with its BlackBerry devices through a BlackBerry Enterprise Server
- TWG had an existing Great Plains ERP system that it wanted to integrate with CRM
- CRM enabled automated workflows to create tasks based on pre-defined TWG processes

### Ease of use

- CRM was easily customized to deal with the workflow requirements of TWG
- With a standard Microsoft interface, CRM is an easy system to learn

### Vendor stability

- CRM runs on the proven industry standard database, Microsoft SQL, and is currently in Release 4.0
- By using proven technology, TWG will be able to maximize the return on its investment and continue to build on its existing Microsoft technology

## SECTOR

Insurance

## ABOUT BDO

BDO is a world wide network of public accounting firms, called BDO Member Firms. Each BDO Member Firm is an independent legal entity in its own country. The combined fee income of all the BDO Member Firms, including the members of their exclusive alliances, was \$5.03 billion in 2009. The global network has 1,138 offices in 110 countries and more than 46,000 people provide advisory services throughout the world. BDO is the brand name for the international BDO network and for each of the BDO Member Firms.

[www.bdointernational.com](http://www.bdointernational.com)

## ABOUT BDO IN CANADA

BDO is the sixth largest accounting and advisory firm in Canada with 95 offices nationwide. Our professionals have the expertise to serve owner-managed, large and mid-market companies, communities and non-profits in a broad range of industries.

### The results

- A new Corporate Products entity was created in CRM to record all of the details of each policy for every corporate client of TWG
- A new Amendment entity was created to record all of the details for each subsequent modification to a policy contract
- A new Individual Products entity was created to record the complete details of each policy for all of TWG's individual clients
- A new Carrier entity was created with links to the appropriate web locations for those carriers, and links to all policies at that carrier for TWG clients
- Word templates were created to automate the creation and attachment of letters, fax cover sheets, envelopes and labels

- Considerable modifications were made to the Account entity to create a prospect rating and tracking system that, in conjunction with a customized sales process workflow, has greatly improved the business development functionality at TWG

### Next steps

- BDO is currently in the process of implementing a customized Microsoft SharePoint solution integrated with CRM to improve efficiencies, enhance productivity, and further advance TWG towards a paperless environment
- Following implementation of the SharePoint solution, TWG plans to work with BDO on an integration of CRM with its existing Great Plains ERP system



BDO Solutions helps small, medium and large size organizations align technology to their overall business strategies using Microsoft technology. We specialize in implementing Microsoft Dynamics GP and NAV and Microsoft Dynamics CRM enabling our clients to streamline their business processes and improve overall operational efficiency. For additional information please contact:

**Gillian Martin**  
gmartin@bdo.ca  
Direct: 416 369 4362  
Cell: 416 315 4463

**Michael Stranz**  
mstranz@bdo.ca  
Direct: 519 772 0334  
Cell: 519 748 7170

**Jim Krahn**  
jkrahn@bdo.ca  
Office: 403 231 5440  
x 5625  
Cell: 403 827 7355