

Enquiry Management & CRM System

Begbies Traynor

Improving conversation rate by streamlining the enquiry and sales process for the UK's largest professional services consultancy.



The Customer

Begbies Traynor is the UK's leading professional services consultancy. They provide their services via a nationwide network of over 60 offices, with clients ranging from small businesses and professional advisers to large corporations and financial institutions.

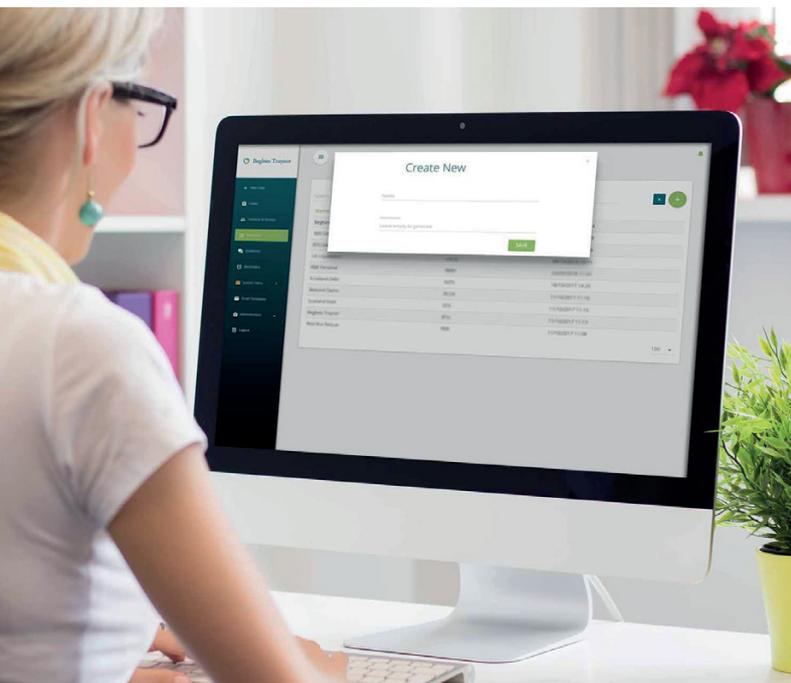
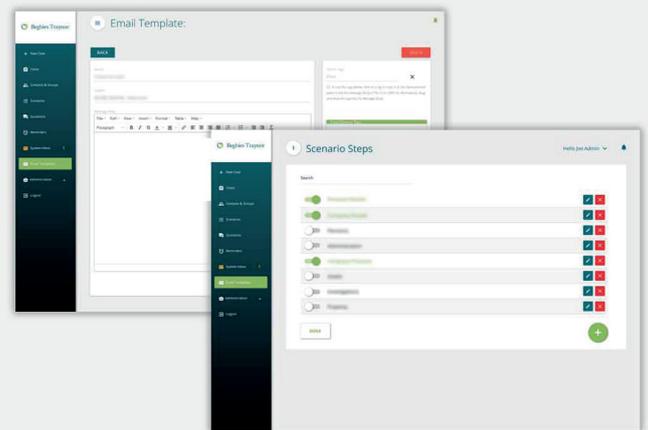
The company forms part of Begbies Traynor Group plc, an AIM-listed professional services consultancy delivering solutions for businesses, financial institutions and professional advisers.

Their Pain

Begbies found their process for managing new business enquiries was not fit for purpose.

As the volume of new enquiries increased it became difficult to manually qualify, assign and track them through the business.

Begbies needed a software solution that would effectively track new customer enquiries and facilitate the smooth and efficient flow of information through the business.



Our Solution

Before any development work began, we met with the Begbies marketing team to map their workflow and identify key efficiency gaps our system needed to overcome.

We then customised our Enquiry Management & CRM System to the precise requirements of Begbies, sharing the software in a test environment to collect feedback from the team.

It was important our system delivered a rapid response to new business enquiries while at the same time minimising disruption to the day to day operations of the case handling teams.

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Key Features



Flexible form builder to collect specific data from new business enquiries



Automated email notifications, task and reminders to track enquiry status



Reporting to measure key metrics such as conversation rate, response times and sales values



Email template builder to automate email response to prospects



Microsoft Outlook integration in and out of the system



Dashboard to track sales funnel and status of enquiries



Begbies Traynor

Impact

"Having instructed Blue Wren to develop an Enquiry Management and CRM System for a specific sector of our firm, we worked closely with all the team, who endeavoured to ensure that the end product was what we had first envisioned. The team made it possible to produce a fantastic system, with a responsive ongoing support network if required at any point."

Chris Lawton, Begbies Traynor

Want to know more about our Applicant Management System?

Get in touch or book a free demo

Call: 01772 823 734 Email: hello@bluewren.co.uk

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