

Case Study - CRM Online

Client Relationship Management (CRM) and Business Process Management (BPM) specialist CRM Online develop bespoke software solutions for clients in a diversity of market sectors.

Working with clients to design and build systems that meet their exact strategic and business requirements necessitates substantial investment. The speed of technological advancement has never been greater and staying "ahead of the game" to deliver sustainable, future proofed systems demands investment in time and resources.

Before an associate introduced them to Fiscale, CRM Online was unaware of the R&D Tax Credit scheme and the positive impact that it could have on their business.

The background

CRM Online was founded in 2005 by Managing Director Peter Sidhu. Peter's vision was to create a company that could offer innovative, affordable technologies and business strategies that would assist clients in working smarter not harder.

Over 10 years later, with a team of 20 and satisfied clients across the globe in financial and professional services, manufacturing, real estate and property management sectors, this aim has been achieved.

Working with some of the most respected names in IT solutions, such as Sage CRM, Microsoft Dynamics CRM and BPM Online, CRM Online has considerable expertise in providing situation dependent solutions. Combining a deep and broad understanding of business process management CRM Online integrates the appropriate elements of these market leading systems into their own bespoke applications to create practical solutions for their clients. This has been the key to their success.

The challenge

Clients turn to CRM Online because they have become aware of areas within their business that could be improved through the application of technology. Whether the challenge to be addressed is increasing profits; improving productivity; making it easier for their clients to buy; developing stronger teams or increasing return on investment CRM Online has to apply its expertise to develop a practical technological solution capable of integration into the client's business processes.

Clients are looking for simple, cost effective ways to implement the new processes and systems into their business. They also expect a solution that is going to meet their unique requirements and deliver a speedy return on investment.

Satisfying the individual demands of each client requires investment in developing, testing and implementing new systems and applications for every project undertaken. At the outset the CRM Online team has to manage a high degree of technological uncertainty as they get into the "nitty gritty" of how the client's business works and define the outcomes they are wanting to achieve.

Business process management analysts, systems developers and programmers work together to deliver flexible and practical outcomes that will exceed the client's expectations where possible and meet their vision and goals.

CRM Online is responsible for ensuring that they retain a team of highly skilled professionals who are fully aware of and competent in the latest technologies.

Employee costs are a major expense for CRM Online. Although critical to securing a high level of success and to preserving its reputation these employee costs cannot easily be cross charged to the client.

The solution

Fiscale's introduction to CRM Online began as a result of a referral from an existing client who had benefited from the successful submission of an R&D Tax Credit claim.

An initial meeting was set up between Stephen Bunting from Fiscale and Peter Sidhu from CRM Online to establish eligibility and the scope of any claim. This meeting took around half an hour. This was followed by a more in depth two hour meeting at Fiscale's office in Haverhill where the type of projects that CRM Online is commissioned to undertake were examined in more detail.

After a couple of telephone conversations Stephen had all the information required to write the report for submission to HMRC. The report was first sent to Peter for approval before being submitted by Stephen to the HMRC R&D Tax Credit team in Leicester. CRM Online's involvement in the submission, from start to finish, took around a day and a half.

The results

The first cheque arrived with CRM Online within 12 weeks of the initial contact with Fiscale. Peter was very happy to receive this substantial amount from HMRC.

"Working with Fiscale has had a really positive effect on our business. Our culture and values are very strong at CRM Online. We are 100% committed to our clients, take full responsibility for our actions and deliver on what we promise. It was so refreshing to work with a company that shared that ethos. Fiscale is a great company to deal with. Any hassle surrounding the R & D Tax Credit application is absorbed by the team; they make it all very easy. Fiscale's systems are slick and efficient and the team really do know their stuff and how to look after clients. We hope to work with Fiscale for many more years and are happy to recommend their services."

Peter Sidhu, MD CRM Online

The conclusion

CRM Online will continue to work with Fiscale to maximise the benefits from the R & D Tax Credit scheme in the future. The money that has been received so far from HMRC will be reinvested in the business to fund the company growth plan.

Staying ahead of the competition is key to the ongoing success of CRM Online. Software development is a highly competitive marketplace and being able to access additional funding through the R & D Tax Credit scheme will enable CRM Online to continue to invest in its expertise and maintain a competitive advantage.