

Chadwick Martin Bailey, Inc.

Chadwick Martin Bailey
Information  Insight  Action

“Vision allowed us to convert 12 years of data from three legacy systems and customize interfaces and reports, all on a tight three-month schedule from the kick-off meeting to the go-live date.”

-Rachel Huang,
Vice President and CIO,
Chadwick Martin Bailey

Deltek Vision® helps market research and consulting firm streamline their operations and increase profit by 130%

THE CHALLENGE

When it comes to getting inside a customer’s head, Chadwick Martin Bailey (CMB) delivers. As a custom market research and consulting firm, they work with some of the best-known brands in the world, helping their customers to acquire, retain and grow their customers. However, CMB’s separate CRM, project management and accounting systems weren’t keeping pace with their own growth.

Their existing systems were a combination of off-the-shelf and custom developed products. Links between the three systems were haphazard and unreliable, licensing fees made access to the systems for all employees cost-prohibitive and duplicate information made record keeping inefficient and inaccurate. In addition, there was a lack of timely, customized reporting or the ability to measure performance at either the practice or individual level. As a result, this lack of information prevented management from making swift and insightful business decisions, from new opportunities to staffing decisions.

CMB’s legacy systems were failing to deliver, and they needed an integrated CRM, project management and accounting solution to increase both the efficiency and profitability of their entire organization.

THE SOLUTION

“We were searching high and low for an enterprise application that could deliver all three functionalities in a shrink wrapped package,” said Rachel Huang, CMB Vice President and CIO. “Deltek Vision brought an end to our search.”

Rather than using a traditional staged implementation approach, CMB ambitiously chose to go live simultaneously with the three modules of Deltek’s Vision solution that they purchased – CRM, Project Management and Accounting. The seamless use of all three modules under one web-enabled design was exactly what CMB needed and proved beneficial immediately after implementation.

CMB was able to convert over 12 years of data from three legacy systems, customize every interface and key report and roll out all three products simultaneously, with just three months between the kick-off meeting and the go-live date.

Contact Deltek

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Deltek (NASDAQ: PROJ) is the leading provider of enterprise applications software designed specifically for project-focused businesses. For more than two decades, our software applications have enabled organizations to automate mission-critical business processes around the engagement, execution and delivery of projects. More than 12,000 customers worldwide rely on Deltek to measure business results, optimize performance, streamline operations and win new business.

THE DELTEK ADVANTAGE

Deltek Vision is now the hub for all information pertaining to CRM, accounting and project management, offering CMB a new, clear look at their operations and pipeline. The new system has helped CMB to build hundreds of reports, delivered automatically to users' Outlook inboxes on a weekly, monthly or quarterly basis. It has also delivered much-needed organizational control. "Other than the financial benefits, 'being on top of things' or 'in control' is the feeling that Deltek inspires among the senior managers as well as project managers," said Huang.

"Deltek Vision has also allowed us to get more focused, integrated and effective with our campaigns," Huang continued. "Having a user-friendly CRM tool gives us flexibility and makes us more efficient when reaching out to clients and prospects."

Since implementing Deltek Vision, CMB has built upon the reporting features and created custom reports for all live opportunities based on the expected close date. Executives, practice leaders and sales staff now get reports in their inbox every Monday morning with opportunities organized by expected close date, enabling them to track opportunities and to take action on the most important items.

To measure the output of their sales staff, CMB also designed a point system using information from the Activity Manager to capture the individual effort sales people make every week. Points are assigned to each type of activity and the total points are then measured against a set goal.

Since implementing Vision, CMB has seen a 130% increase in profits. Overall, Deltek Vision has enhanced CMB's efficiency and profitability and the solution gives them real-time access to the important information they need to make crucial business decisions.

STATS AT A GLANCE

Company Name: Chadwick Martin Bailey, Inc.

Headquarters: Boston, MA

Primary Business: Chadwick Martin Bailey is a global custom market research and consulting firm. CMB helps the most successful companies and best-known brands in the world by identifying the specific actions they can take to acquire, retain and grow their customers.

Industry: Consulting

Deltek Product: Deltek Vision

URL: www.ChadwickMartinBailey.com

THE DELTEK ADVANTAGE

The implementation of Deltek Vision's CRM, Project Management and Accounting systems enabled Chadwick Martin Bailey to:

- Increase profit by 130%
- Lower costs by 4%
- Manage and grow their business effectively
- Immediately access accurate, timely information
- Automate reporting and distribution
- Track and reward individual and practice performance