

**HITACHI**  
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 Microsoft Dynamics

## Grant Thornton Case Study

 Grant Thornton

 Hitachi Solutions



# HITACHI SOLUTIONS DELIVERS BUSINESS AND SYSTEMS TRANSFORMATION PROGRAMME IN RECORD TIME FOR UK'S LEADING PUBLIC SAFETY COMMUNICATIONS ORGANISATION

**GRANT THORNTON** is one of the world's leading organizations of independent assurance, tax and advisory firms. Over 31,000 Grant Thornton people, across 100 countries, are focused on making a difference to clients, colleagues and communities.

## PROJECT OBJECTIVES:

**Grant Thornton worked with Hitachi Solutions to create a global CRM solution that would:**

- Replace existing outdated CRM technology
- Create a global, best practice template for customer excellence
- Streamline sales data processes, procedures, and terminology on a global level
- Localize and implement in nearly 100 countries
- Provide a centralized and customized view of account data

**“Hitachi Solutions had the global reach and experience we preferred. We were confident they could help us build out our initial template system, and help each country move forward with their localizations and implementations”**

**Rick Stow, Head of Client Relationship Management at Grant Thornton**

## Challenge

Grant Thornton (GT) prides itself on providing quality, personalized service to its clients despite being a dynamic, fast-growing global company. However, with almost 100 autonomous offices in nearly as many countries, GT had hit a critical juncture with its existing CRM systems. Some countries had no CRM, and those who did had system that were outdated, inefficient, and could no longer support the company's sales and marketing operational needs.

“Like most companies today, we were being asked to do more with less, and yet our company and clients were continuing to grow at a rapid pace,” said Rick Stow, Head of Client Relationship Management at Grant Thornton. “We had our existing CRM solution for 11 years, but there was no global visibility and no consistency—every country had its own system and processes. We needed a new CRM platform that would give us a standardized footprint for global success and support our high standards for customer service and managing tight relationships.”



The company also strives towards global visibility to client contacts and account sales activities, so that account representatives could better leverage relationships on a global level, prevent inefficiency and duplication of sales activities, as well as exploit competitive situations.

### Why Microsoft Dynamics CRM and Hitachi Solutions

Selecting the right CRM solution was a global initiative for the company. A global committee was created to define a detailed requirements document for system and vendor selection. After an exhaustive evaluation, GT ultimately chose Microsoft Dynamics CRM because of its power, flexibility, scalability, and familiar Microsoft look and feel.

“Microsoft Dynamics CRM met all our requirements for a global CRM solution,” said Rick. “We are a Microsoft shop, the integration factor of our solution with all our other corporate systems and the same easy look and feel of Microsoft Outlook was very compelling.”

Also, Microsoft allowed GT to implement a mix of on-premise and on-demand products.

“Some of our countries like using the cloud and others don’t. Microsoft is able to handle this requirement extremely well,” said Rick.

After selecting Microsoft Dynamics CRM as the platform, GT now needed a system integrator to help execute their global vision. They chose Microsoft Dynamics Gold Certified Partner Hitachi Solutions.

### Solution

GT’s global committee not only created the requirements, but also developed a CRM blueprint system that defined consistent best practice processes procedures, and terminology. They call their system “OneView,” and it provided each country with a standardized template they could then localize and implement on their own.

**SOLUTION:**

- Microsoft Dynamics CRM On-Demand
- Microsoft Dynamics CRM On-Premise
- Hitachi Solutions consulting and implementation services
- Hitachi Solutions' LinkedIn connector
- Dun and Bradstreet's 360 Solution

With the global CRM template complete, Hitachi Solutions helped develop a roll-out strategy for the first participating countries, which included the U.S., Canada, Germany, India, and Peru. Hitachi Solutions works with the countries as they localize the template to accommodate their specific requirements, while still maintaining global visibility and consistency.

With GT's new "OneView" system, the account planning process is built into CRM. Account managers can now see the relationship's strengths, weaknesses, opportunities, and threats. They can also see where a competitor is servicing the client, and collaboratively plan how to best serve their clients.

GT is well on their way to having thousands of users spanning dozens of countries.

**BENEFIT:**

- Provided better visibility and understanding of clients and relationships
- Allows GT to do more with less
- Provided consistency and efficiency to help meet growth goals
- Allow us to grow while maintaining the close relationships that differentiate us
- Provided more up to date information, faster
- Provided flexibility and scalability that saved money and resources

**Benefit**

Global collaboration, Microsoft Dynamics CRM technology, and partnering with Hitachi Solutions are allowing GT to successfully execute its vision for global CRM visibility consistency, and efficiency.

"The new system is instrumental in helping us maintain a high level of personalized service with our clients while still achieving our aggressive growth goals – we want to double in size within the next five years," said Rick. "Having repeatable and efficient processes and a scalable system, and working with the right global partners is key to keeping us on track to meet this objective."

The new system also allows GT to do more with less, will scale with them as countries continue to roll it out, and gives them a much better understanding of their clients and relationships.

"In the past, account reps often went to meetings and found out from the client that someone else from GT had just been there, which is embarrassing," said Rick. "Now everyone in the company can easily keep track of sales and client activities. They know who has been to see a client and what was discussed. This allows us to take





## WHY HITACHI SOLUTIONS?

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's caliber of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts.

Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.

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potentially embarrassing situations and turn them into a relationship-building experience.”

Identifying key influencers, decision makers, and who-knows-who has been huge for GT. On average, the search for contact information is estimated at less than 15 minutes instead of one to eight hours.

Users find the software extremely easy to use, and much of the administrative burden of a CRM system has been reduced.

GT also saved at least 50 percent on software implementation and consulting costs by creating a global template.

