

Captavia™ assists Business Link for Norfolk to act as the gateway to business support in the Norfolk County



Business Link for Norfolk (BL4N) is charged with supporting the development of a successful and expanding economy within Norfolk. Its aim is to ensure sustained job and wealth creation. To do this BL4N facilitates the promotion of business growth and innovation within Norfolk's new and existing companies. Access to BL4N services is provided via a number of channels including the website, the business adviser team and the Gateway call centre.

BL4N delivers its business support and creation services through a wide variety of partner organisations. These can include other Business Support Organisations, Enterprise Agencies and UK Trade and Investment. Working with partners enables BL4N to draw expert advice from the most appropriate source specific to the customers' needs.

An extensive range of services are available to support business start-up, business growth and continued development of local companies. Guidance in aspects of business development are covered including areas such as finance, international trade, rural and agricultural development, and information and communication technology.

INTRODUCTION



The Requirement

Working with a number of partner organisations, BL4N faced several challenges in the use and development of an optimum customer relationship management (CRM) system. The brokerage model of delivery resulted in the need for more partners to enter data on the CRM system. This was a complex task that resulted in inconsistent data entry which impacted data quality.

Ensuring high quality data was a major priority for BL4N. The data from the CRM system is critical for internal reporting and management as well as reporting to a number of external stakeholders.

The existing system was not flexible enough to meet the current and anticipated business requirements. It had failed to keep pace with the evolution of the service delivery model. BL4N required a CRM system that would reassert itself as core to their business, reflecting the way they worked and facilitating the capture of timely and accurate data.

Solution

Initiative Software's CRM solution, Captavia™, was selected to address BL4N business requirements. Born out of Initiative Software's expertise in economic development business support, Captavia™ is a good fit for BL4N with a customisable product offering contact management, partner management, marketing, performance assessment and order fulfilment capabilities.

A survey of BL4N staff after the initial implementation highlighted that the screens and processes they had created significantly improved data capture but that further work would maximise the benefits of the new system. A Captavia™ Development Manager was appointed to ensure that Captavia™ was moulded to the needs of the organisation. Captavia™ has grown to reflect the needs of the organisation and is now at the heart of the way in which BL4N does business.

Captavia™ reflects the business processes within BL4N and is used from back office activities through to the business advisers. Each department has a unique view of the system with each screen customised specifically for that department's screen layout and workflow needs.

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"The flexibility of Captavia™ has been fundamental to the benefits we have experienced. We have an efficient and effective CRM system that is used throughout our organisation and connecting with our partners. We have experienced significant improvements to the quality of our data and feel we have developed the screens and processes in Captavia™ to be our own CRM system that reflects our business model," comments Rachel Corfield, BL4N Captavia™ Development Manager.

After the implementation of Captavia™, BL4N provided a helpdesk service to its partners for any issues they had using the new CRM system. During the first month of use the partners raised approximately 30 calls as they climbed the learning curve, 3 months after implementation the average number of calls logged has halved as the benefits of a simplified and bespoke data entry system are realised. Partners now enter accurate and timely data due to the simplicity of use of Captavia™.



Client Relationship

"The power, flexibility and ease of use of Captavia™ will allow it to satisfy our future business needs," states Rachel Corfield Business Link for Norfolk Captavia™ Development Manager. "We aim to work closely with our partners and local government organisations to develop one central database for Norfolk. This will ensure collation of accurate business data and support improvements in coordination of business support by removing market confusion to the business community and build a stronger foundation for regional activity."

