How Brand & More Protected Its Client Relationships by Consolidating Legacy Data

At a glance

Challenges

- Fragmented data across legacy systems
- Senior customer relations staff members are retiring
- Paper records that contained valuable customer information

Results

- Legacy data turned into competitive insights
- Clean, easily accessible information
- Unexpected valuable insights into customers

Keeping Customers Loyal in a Competitive Market

Brand & More is a mid-sized professional services firm with a highly regarded reputation and long-standing client relationships.

However, as competitors changed their operations, John Low, Client Services Director at Brand & More, faced a growing challenge: keeping strong relationships while working with fragmented, outdated systems.

The company was known for its personal approach to client service. However, its internal CRM setup was slow, disjointed, and difficult to manage.

It relied on older staff members sharing information with newer staff members if they couldn't find what they needed on the network. In addition, the company was facing another challenge.

The retirement challenge

And that issue was that several senior client managers were nearing retirement.

These team members had well-established client relationships, and the company risked losing their valuable knowledge.

With rival firms already using advanced platforms, Low wondered if they'd left it too late.

He contacted Insight-Team, a BI-powered CRM and analytics tool provider, to help them solve this problem and stay competitive.

> *"We had no idea how to convert reams of paperwork, which contained valuable customer information, into our network."*

Turning Legacy Data Into Competitive Insights

Tom Elliott, Head of Implementation Services, says, "Brand & More relied on multiple systems, including spreadsheets, legacy CRM tools, and paper records.

This was about more than centralising data; we needed to make the data work for those who needed it."

Insight-Team's specialists visited Brand & More's offices, mapped their processes, and developed a step-by-step migration and training plan.

"They walked us through how we could clean and migrate our data without losing the personal history our client relationships rely on," says Low.

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Uncovering Hidden ‘Treasure’

The results arrived quickly.

"Having all our client data in one place changed everything," says Low.

"Our account and marketing teams were more effective. We now have insights into our clients and market that we've never had before."

Some of Brand & More's clients have been with the company since before it began storing data digitally, and some of their information is still kept on paper records.

Additionally, several of their senior client managers had client information that wasn't documented.

"They work with their clients regularly and have never written down that information," he says.

Low didn't know how they could bring all this information into their system.

Thankfully, Elliott had a solution: they would interview the managers, transcribe the results, and scan and convert the paper records.

As Elliott says: For Brand & More, this turned out to be a treasure trove of information.

> "We never expected to discover so much useful information about our customers. it has changed the way we market the company."

An Unexpected Win

And there was a surprise benefit.

"By analysing our communications data, we realised many of our high-value clients actually prefer printed briefings and in-person follow-ups," says Low.

"We'd assumed digital would be quicker and more convenient, but the data told us something different."

The new system also enabled Brand & More's team to access data wherever they were - in meetings, working remotely, or from client sites.

Access to this information means staff can respond to clients faster, wherever they work.

Stronger Team Collaboration

Client services, sales, and support teams can now share notes, flag preferences, and coordinate follow-ups using Insight-Team's collaboration features.

Managing client expectations across the company and delivering a consistent experience is much easier and more effective.

Low says, "I think we've only just got started, there's so much more we can offer our clients now."

The Competitive Edge They Needed

We thought we were too far behind," says Low.

"But Insight-Team helped us move forward fast. We're no longer worried about losing customer insights when team members retire or leave the company.

We've improved loyalty and increased revenue, and we have the breathing room to focus on our future growth.

Our staff find the system easy to use, and help is always there if they do get stuck.

Most importantly, this system gives our team more time to do what we do best - take care of our clients."

At a glance - the results

- Valuable customer information found in legacy data
- Improved communication with customers
- Easier collaboration across the company

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