

# Lloyds Register Standardizes on Salesforce to Effectively Target, Acquire and Retain Business Assurance Clients Worldwide



## Industry

Risk Management

## Geographies

Worldwide

## Challenge

- ∴ Gain consistent picture of client relationships through consolidation of homegrown systems currently in use across 26 LRQA locations worldwide
- ∴ Co-ordinate activities and collaborate more closely across geographies and time-zones
- ∴ Re-organize sales processes into one common and consistent methodology worldwide
- ∴ Diminish the volume of repeat data entry
- ∴ Become more agile in the approach to sales management
- ∴ Better support the targetting and acquisition of business assurance clients by the removal of the fragmented approach to managing client relationships

## Solution

LRQA deployed Salesforce SFA and the Apex as part of a multi-tenant CRM solution designed to increase sales effectiveness and efficiency.

## Results

- ∴ Led to 'a positive impact' on sales conversion rates within 12 months of going live
- ∴ Enabled LRQA to track deal progress and milestones; increasing the productivity of sales teams using standardized sales processes and methodologies
- ∴ Provided real-time performance reporting on sales pipeline, win-loss ratios and sales trends more clearly
- ∴ Increased management control, transparency and accountability
- ∴ Straightforward customization enabled LRQA to adapt the system to its specialist business assurance needs
- ∴ Salesforce Sandbox provided a valuable environment in which both the testing of new configuration and pre-deployment training could be effectively managed.

“The UK and Japan have been live six months and one year respectively, and already in that time, we have identified a positive impact on sales conversion rates.”

— Matt Murphy  
Strategic Planning Manager

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## Client Management Systems Designed Round Most Critical Business Risks

'Business assurance' is what LRQA uniquely offers its clients. This approach helps provide assurance that a client's management systems are designed round the most critical business risks, that processes produce the outcomes that stakeholders want and that the management system is capable of improving the way the organization operates. In recognition of the principle of continuous improvement, LRQA realised that it needed to adapt to effectively target clients worldwide and successfully manage their needs.

LRQA is a global business with more than 26 locations worldwide, and until now each site was using a variety of systems to manage client relationships. The approach undermined LRQA's ability to understand the needs and preferences of clients, particularly international organizations. Moreover, the fragmented approach to managing client relationships also made it hard for management to obtain granular reports into global and regional activities and results.

Matt Murphy, Global Strategic Planning Manager LRQA, explains the hurdles that needed to be overcome. "To effectively exploit sales opportunities, we needed to co-ordinate our activities and collaborate more closely across geographies and time-zones," he says. "Our sales processes needed to be re-organized into one common and consistent methodology worldwide; we had to diminish the volume of repeat data entry; and we needed to generally become more agile in our approach to sales and client management."

## Flexible, Cost-Effective, Easy-To-Use CRM System

Two of LRQA's most successful territories—UK and Japan—simultaneously studied the conundrum. The outcome was a decision to standardize on Salesforce.com. "One of the first steps was to have our business managers examine what sales processes we needed to drive the business forward," says Murphy. "The overriding conclusion was the need for a flexible, cost-effective and easy-to-use system. As the technology and market leader, salesforce.com provided us with the breadth and depth of functionality we needed to grow the business. The multi-tenancy solution also gave us the option to easily customize the system to suit our unique verification and assessment needs."

LRQA has deployed Salesforce SFA and the Apex to 169 sales professionals globally (17 in Japan, 25 in the UK and 127 in the rest of the world) to create a single, comprehensive view of its clients. The teams now have a unified view of leads, opportunities and accounts, together with detailed, drill-down insight into activities and workflow. Importantly—given the complexity of the large client organizations LRQA sells into—the company now understands the role that each contact plays in the business relationship. The management teams also have the flexibility to forecast revenue accurately and in real time, use historical trends to better predict future patterns and view forecasts by service, individual, and time period for more detailed analysis.

"The UK and Japan have been live six months and one year respectively and, already in that time, we have identified a positive impact on sales conversion rates," says Murphy, "This can be attributed to the fact that we have standardized sales processes and methodologies, we can now track deal progress and milestones in Salesforce and that we are increasing the productivity of every member of the sales team."

## Sales Reporting Exceeds All Expectations

The management team is also impressed by the real-time performance reporting. Duane Wood, UK Sales & Marketing Manager, adds, "The reporting has really exceeded all expectations. Using customized dashboards, management has real-time access to critical, detailed sales information. We can analyze the sales pipelines,

“ Since the implementation of Salesforce.com it has contributed to an increase in sales of LRQA UK services by more than 10%. In addition the forward visibility and transparency of revenue pipelines, coupled with reporting of sales and marketing activity has significantly improved performance monitoring, business planning and forecasting processes. ”

— Duane Wood  
Sales & Marketing  
Manager

perform win-loss analyses and understand sales trends more clearly. This all filters down to improved control, transparency and accountability.”

But it's not only improved lead conversion rates and improved reporting that are winning the hearts and minds of the LRQA user community: it's also the adaptive nature of the system. LRQA is a highly specialist business assurance organization and its clients have unique needs. An 'out-of-the-box' implementation of Salesforce would not have met those needs, which is why LRQA are using the Apex to adapt fields, tabs, layouts, objects and workflow quickly and easily. "We have streamlined Salesforce to create one set of page layouts for the entire LRQA business stream", continues Wood. "A multitude of different processes—including price books, custom rules, triggers and lists—are all being customized using Apex."

Moving quicker than the rest of the industry is a key driver for LRQA. Here, the Salesforce Sandbox comes into play: enabling the LRQA team to test new customizations or features before rolling them out on the system, providing a development environment for building and testing integrations and internally built applications and delivering a training environment for employees.

"The IT team uses the Sandbox all the time as their primary pre-production system. We have also used it to produce an e-training package for the on-going global roll-out," says Wood, "Since the implementation of Salesforce.com we have seen an increase in sales of LRQA UK services of more than 10%."

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