



## **Streamlined Processes Generating Success**

**Client :** Drury PSM  
**Vertical Market :** Professional Services  
**Requirement :** Lead Management  
Transparent staff development  
Streamline operations  
**Solution:** GoldMine Premium Edition

### **Benefits to Drury PSM of GoldMine delivered by Caltech :**

- Effective lead management, with a shorter sales cycle
- Transparency of employee effectiveness
- Cost effective system that contains no missing or stale data
- Employees empowered with tools to do their jobs efficiently
- Allows employees of Drury PSM to deliver a fantastic customer experience
- Management have a strategic system that they can manipulate and use

**“I couldn’t imagine how everything would be joined up without GoldMine.”**  
**Rosemary Izzard, Drury PSM**

### **Background**

Established in 1991 by Tony Izzard, Rosemary Izzard and Ian Rainbow, Drury PSM offers specialist HR Services and Health and Safety Management professionalism for businesses; both corporate organisations and small medium enterprises.

Drury PSM is now one of the UK’s leading providers of HR solutions, and has in excess of 1,500 clients throughout the UK.

### **Effective Lead Management**

During 1999 Drury PSM recognised efficiencies it could enjoy by implementing a system to track leads and help the prospecting stage of its sales process. It also recognised that being paper free would allow cost savings as well as enabling sharing of files that otherwise would be inaccessible to those employees working across the country.



Rosemary Izzard explains

“Our telesales team were using directories and lists to contact leads. Following each call they would write on that list an action; call back, not available etc.. If they did get a prospect from this lead generation method, the telesales team would gather all related information and make a file for each customer.”

“The telesales team were also generating 200 to 300 letters per week and then following up with calls, but if that lead that was on annual leave, or out of the office for any time, recipients would not remember the letter.”

Drury PSM recognised to be even more successful that it needed to have a system that would be less manual, be more accessible to everyone, even those not working from its Head Office, and be less paper reliant. The system would need to be able to track the leads and prospects and speed up the process of communication.

### **The Solution**

Drury PSM contacted several software organisations. Caltech demonstrated GoldMine and the efficiencies that Drury PSM could effect through the system.

GoldMine Standard Edition was chosen, as the solution offered all the capability that was required. GoldMine is easy tailored and could grow with Drury PSM. In 1999 Caltech worked with Drury PSM to implement the system.

“The process is much more refined today, after 10 years of use. The team now are able to do their roles much more efficiently. GoldMine is the heart of the business.”  
Rosemary Izzard, Director Drury PSM

### **Central Repository**

GoldMine manages Drury PSM’s lead process from prospect through to account management and marketing. It also is tied up with invoicing and service.

Rosemary Izzard explains,

“GoldMine allows us to see clearly where Drury’s employees are most effective, and we can monitor activity. We can highlight leads that may be demonstrating signs of getting ‘warm’ and ensure they are given priority. GoldMine also allows the management team to see clear reporting activity that can help to highlight any efficiencies or best practice and share knowledge throughout the consultant base.”



GoldMine has saved Drury PSM time, effort and money. "I wouldn't like to think how many filing cabinets we would need if we didn't scan all our contract information!"

**"We can highlight leads that may be demonstrating signs of getting warm and ensure they are given priority." Rosemary Izzard Director Drury PSM**

### **Accessible Easy Searches**

GoldMine is essential to search efficiently through information held. Everyone has the same information at the same time which is imperative when running any organisation.

GoldMine manages all the appointments and activities for each prospect/client. When clients contact Drury PSM, that communication is logged on the system and tasked to the right manager or consultant, who can then complete notes and put a task in for the next action. Nothing is ever forgotten as the system is clear and it will point the user to the next action.

If a lead comes in and isn't replied to then this will be flagged up in GoldMine and Drury PSM can ensure the right information is sent to the right person. It means that Drury PSM isn't reliant solely on the knowledge of its employees so when an employee is away from the office the organisation can still function successfully.

If there are issues on an account, the account can be flagged on GoldMine so that the caller can be channelled to the right person to resolve any matters. Again this helps customer experience by being clear and in control of the communications.

Drury PSM upgraded to GoldMine Corporate Edition in 2006.

### **Future**

Drury PSM has recently upgraded to GoldMine Premium Edition after using GoldMine from FrontRange solutions successfully for over 10 years.

Rosemary Izzard concludes,

"Every activity in the business is tracked and if someone isn't in the office everyone can see where their appointments are and what is happening, which really does empower our staff and assists a great customer experience. I'm not sure how we could be so effective without GoldMine"

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- Ends -



## **About Caltech**

Established in 1999, Caltech has become one of the UK's leading suppliers and implementers of Customer Relationship Management software (CRM). Based near Leeds, it works with clients to manage their customer contact strategies, operational processes and daily business functions in order to maintain audience loyalty, increase awareness and ultimately drive sales. This is achieved by recommending, implementing, developing and integrating a variety of cutting edge database technologies that are most suited to the brief in hand, including; Microsoft Dynamics CRM, GoldMine, HEAT and ACT! By Sage.

Caltech is able to tailor every system to the specific needs of its clients whether it is an SME or large blue chip organisation and regardless of their IT capability. Long term and successful integration is when CRM works best so Caltech, unlike many of its competitors, is not just a supplier – the team works on an ongoing basis with every client to develop specific systems so they work hand in hand with existing software, from accountants systems to telephony packages, which can be adapted to meet ever changing needs.

Current Caltech clients include; Simply Biz, TNT, the NHS Information Centre and Hays Travel. Customer service is at the very heart of everything Caltech does – it sees clients as partners and is committed to meeting and exceeding expectations in the most effective way possible, leaving a real sense of confidence.

### **To find out more contact**

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