



xRM to Match Projects and Clients Effortlessly

Client :	Leeds Ahead
Vertical Market :	Not for Profit
Requirement :	To match clients with projects
Solution:	Microsoft Dynamics CRM

Benefits to Leeds Ahead of Microsoft CRM delivered by Caltech :

- Transformed the way the team manages client information
- Automated matching projects to clients saving time and effort
- Effective reporting
- Management have real-time visibility of what is happening in the organisation with their clients
- Improved accountability and response times

“Trying to match the projects to clients in the volumes we need would be impossible without CRM.” Lucy Boaden Operations Co-Ordinator Leeds Ahead

Mini Case

Leeds Ahead is an award-winning not for profit social business that helps companies across Leeds to get involved in the social and economic regeneration of the city. Leeds Ahead provides the links and support that enable businesses of all sizes to play a hands-on role in:

- Raising educational attainment
- Helping those who are not in work to get jobs
- Helping the voluntary and community sector to be effective
- Improving the environment
- Growing enterprise

Leeds Ahead contacted Caltech during 2007 as it wanted to use xRM to match projects with clients and manage its clients effectively through xRM. Microsoft Dynamics CRM was the system chosen, as it had the capability to manage their matching requirements and achieve a great deal for them going forward such as event management and client relationship communications.

Lucy Boaden, Operations Co-ordinator explains,

“CRM saves us so much time matching projects with our clients. This leaves employees free to spend time where it is more valuable and making more of a difference.”



What's next?

Caltech are working with Leeds Ahead to expand their system and allow it more capability to do more for them. December 09.

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.

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.

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