

CLIENT SUCCESS STORY

Symatrix

Project
Business Alignment



Client
Symatrix



Industry
High Tech

Location
Manchester

Staff
75

Products
Sales & Marketing Cloud, Chatter

Symatrix are a privately owned SaaS business specialising in Payroll and HR services. With a team of circa 75 employees and a portfolio of over 100 consultants they have successfully delivered to a wide range of organisations ranging from FTSE100 to Universities, Government Agencies and smaller privately owned entities. Symatrix are ISO27001 certified and offer BPO, Project Delivery for Oracle Cloud and Managed Services.

The Business Challenge

Symatrix have grown over 15 years with several changes in leadership and an increasing portfolio of products and services. This has meant that from a systems perspective, the Salesforce platform which has been heavily invested, has become disjointed and no longer represents the business or its processes.

Symatrix have secured best in class solutions to deliver the end to end customer journey (Sales, Delivery, Managed Service), however, over time the complexity of the business has increased whilst the systems without a dedicated team to support them have been left behind. Executive board recognises that with growth targets increasing against a fast-changing marketplace that they must address the technology gaps quickly to maintain a competitive advantage.

The Solution

- Detailed deep dive discovery utilised to establish a target operating model for People, Technology and Processes.
- Upgrade to Salesforce Lightning and the latest iteration of Kimble
- Rebuild of the Lead and Opportunity objects to utilise products and opportunity types (product-led solution)
- Introduction of Sales Health tools to gain better insight into relationship state
- Introduction of Marketing cloud to drive multi-channel marketing activity
- Re-implementation of Kimble to support end-to-end resource, project, and financial management (multi-tenanted install)
- Delivery of core security model changes to enforce data ownership and segregation (ISO27001)
- Delivery of CMS configuration changes to automate email management and reduce off system activity
- Implementation of Chatter to support org-wide collaboration
- Restructuring of reporting and dashboards to reduce clutter, duplication, and disparity.

The Results

As a result of the transformation Symatrix have been able to:

- Streamline the Sales journey reducing data duplication and errors
- Introduce new product offerings and strategic partnerships (XCD)
- Increase visibility of Sales and Marketing pipelines
- Increase transparency regarding resourcing of projects
- Simplify invoicing of clients throughout the project lifecycle
- Improve handover between business areas and increase early engagement
- Increase revenue through identification of unbilled hours
- Increase revenue through earlier renewal engagement
- Improve security and reduce risk of data leakage
- Increase companywide awareness regarding wins (and losses)
- Centralise reporting to ensure standardisation and consistency of key metrics.

In addition to the above, Symatrix have also implemented a dedicated Salesforce management team and partnered with Consleague who now support the platform as a managed service.

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