

# CHARTERIS

Seamless business and IT for performance advantage

## Seeing the bigger picture

At Moody International everything is big - from the size of its customers and the extent of its worldwide operations to the height of its ambitions. Every day, the company engages with customers and works on vast numbers of projects in up to sixty countries around the world. Charteris helped the company to gain greater visibility of its global activities, and now employees right across the business can see the bigger picture.

Moody International's clients are giants in their industries. They include almost all of the world's top oil and gas organisations, as well as successful global businesses in industries such as electronics and chemicals. Many of these large organisations contract services from Moody International across multiple countries and regions.

Despite the global nature of its customers' businesses, Moody International used to respond to tenders and deliver services locally. Its country managers work from eighty offices around the world, and there was no formal process for sharing information between regions. Mark Peacock, CIO of Moody International, explains: "There wasn't a great deal of visibility at group level of who was talking with who, and we really needed a better understanding of our customers' requirements from a global perspective."

Moody International decided to appoint twelve global account managers to work

with local country managers and help to coordinate sales to the organisation's twenty five largest, global customers. To support this new organisation structure, Moody International quickly realised that it needed a new way to consolidate information about different projects in different regions and make it accessible to everyone.

After evaluating several customer relationship management (CRM) solutions, Moody International decided to deploy Microsoft Dynamics CRM and selected Charteris from amongst Microsoft's partners to help it deploy the solution. "We knew that the project wasn't just going to be about implementing a piece of software and using it; it was also about mapping out and formalising processes to support our new business model," says Peacock. "We were therefore looking for consultants who could provide not just technical knowledge, but also an understanding of customer needs and business processes."



### Client

Moody International Group provides technical inspection services, technical staffing, technical and behavioural training and management system certification. With more than 80 offices in 60 countries the company meets the needs of organisations in industries including oil and gas, power, mining, construction, engineering, chemical and food.

### Goals

- Facilitate the introduction of a new centralised approach to global account management
- Introduce the use of a customer relationship management (CRM) solution globally

### Charteris' Role

- Devise and map out new centralised sales processes
- Assess the requirements of country managers and the new global account managers
- Specify the requirements of the CRM system
- Deploy Microsoft Dynamics CRM, tailored to the company's new processes

### Results

- Clear, well defined processes for the new sales approach
- Buy in from country managers and global account managers
- A thorough system design for Microsoft Dynamics CRM, that reflects new processes
- Microsoft Dynamics CRM rolled out to over 200 users

### The right combination of skills

To meet Moody International's requirements, Charteris provided two consultants, with complementary skills. The first was an expert in Microsoft Dynamics and had a thorough technical knowledge of the CRM solution. The second consultant came from Charteris' customer centricity practice and was highly experienced in business process mapping.

Charteris analysed current business processes, proposed revised processes to support the new centralised sales approach and then specified the requirements of the CRM solution. The consultants organised four workshops, at which current processes were discussed and mapped, and new processes devised.

Both of the Charteris consultants played a key role in the workshops, so that the business requirements and technical capabilities of Microsoft Dynamics CRM could be considered alongside each other. This approach saved a significant amount of time, as Peacock explains. "As we invented a box in the process, we would then ask 'will this work in the CRM?' It was an iterative approach, and we avoided the pitfall of inventing processes that would be difficult or impossible to implement. Having both consultants, and both skills sets, speeded up the whole process. Otherwise, we could have developed the processes and then spent weeks trying to map them to the capabilities of the CRM solution."

### A far better customer service

Next, Charteris worked with Moody International to implement Microsoft Dynamics CRM and roll it out to around two hundred users. "We now have clear business processes and a CRM solution that is precisely mapped to these new processes," says Peacock.

The deployment of the new CRM solution provides Moody International with clear visibility into what is going on in the sales process across all countries. The solution allows country managers, sales teams and the global account managers located around the world to share information and cross sell complementary services from different business units into the same customer. As a result, Moody International is strengthening its relationships with its biggest customers and is able to exploit more business opportunities in more global regions.

Moody International believes that its use of the CRM solution is also helping it to improve its customer service. "A lot of our business is repeat business, so it is important for us to differentiate ourselves with good customer service," says Peacock. "Now, in meetings with customers, our global account managers and country managers know exactly what is happening with all ongoing projects and tenders in all countries. This knowledge gives our customers more confidence in us and enables us to deliver a far better service."



**"Our global account managers and country managers know exactly what is happening with all ongoing projects and tenders in all countries. This knowledge gives our customers more confidence in us and enables us to deliver a far better service."**

**Mark Peacock,**  
CIO, Moody International



### About Charteris

Charteris is a business and technology consultancy that designs and delivers powerful, innovative solutions for Enterprise and Mid-market companies in the UK. The company is organised into three specialist practices - Business Consulting, Advanced Microsoft Consulting and Microsoft Dynamics Solutions – that combine to give customers a unique 360° approach to business and technology challenges.

**www.charteris.com** email: info@charteris.com  
**Tel:** +44 (0)20 7600 9199 **Fax:** +44 (0)20 7600 9212

### Charteris clients include:

AB Agri | Argos | ASDA | Booker | Debenhams | Exova | G4S Risk Management  
John Lewis Partnership | Marks & Spencer | Microsoft | Northumbrian Water  
Sainsbury's | Swan Mill Paper Company | Tesco | TLV Euro Engineering

# CHARTERIS

Seamless business and IT for performance advantage



**Microsoft Partner**  
Gold Enterprise Resource Planning

Charteris plc, Charteris House,  
39/40 Bartholomew Close, London EC1A 7JN