Case study: Integration of a CRM into an existing platform

The Centre de transfert d'entreprise du Quebec (CTEQ) offers its services to Quebec entrepreneurs who are selling or taking over a business. Since its founding in 2014, this non-profit organization has supported more than 11,000 entrepreneurs across the province. It serves as a gathering place for the business transfer community, working closely with political and economic players in each of Quebec's 17 administrative regions. The organization works tirelessly to offer its users high-quality services, innovative training programs, and helpful tools to discover and cultivate new opportunities.

The CTEQ approached PLANCO to help it implement new, more user-friendly client features for its INDEX platform. Additionally, the CTEQ wanted to automate certain functions, permit user collaboration with advisors, and offer additional tools to its clients.

Challenges

The CTEQ's major offering to business transferors and buyer was a platform for networking and discovering local opportunities. However, the technology was overdue for a facelift. The CTEQ needed to accommodate various client needs, manage profiles more effectively, improve user access, increase data security, and add several new features. Moreover, all these elements needed to be fully integrated into the CTEQ's CRM system, its principal internal platform.

Why PLANCO?

From its first mandate for the CTEQ, PLANCO impressed the organization with its efficiency and expertise. PLANCO exceeded CTEQ's expectations at every turn, putting it at the top of the organization's list for this systems integration project.

PLANCO's proposal

PLANCO's approach consisted of multiple steps. The first was data conversion, followed by change management for users and external clients. Using agile development methodology, PLANCO created a user story to assess the project's scope and prioritize deliverables. This use-case-based approach involved an imagined user who wanted to accomplish something through CTEQ's platform, helping PLANCO determine the most effective architecture for the new features.

Proposed solution for CTEQ employees: Provide employees with training on the updated external client platform and familiarize them with the new work processes.

Proposed solution for clients: Create a FAQ, add account and data management features, and give clients direct access to CTEQ advisors.

Results

Once the integration was complete, all user groups immediately had access to the improvements and new features on the INDEX platform.

Benefits of CRM integration:

- **For the CTEQ:** Standardized data and simplified work processes for all user groups increased platform efficiency and improved the visibility of extant training materials.

- **For advisors:** Eliminating tedious manual data entry let advisors focus on their real task: helping clients buy and sell businesses.

- **For managers:** Improved data quality control simplified profile creation, while an automated billing system reduced hours spent invoicing.

- **For clients:** Online payment options, profile self-management, and new search functions enhanced the client experience.

- **For PLANCO:** By carrying out the project, PLANCO got the satisfaction of implementing an integrated, automated system for several user groups at once!

Conclusion

After six months of work, the PLANCO team successfully integrated the CTEQ's CRM. The firm met every goal, including:

- Eliminating of manual data entry at registration
- Implementing standardized registration and billing processes that bridge the CRM and external platform
- Overhauling platform appearance (colour scheme, UX, features)
- Standardizing search functions on the client platform
- Automating certain interactions between clients and advisors
- Converting data to the new platform
- Creating an automated billing system

By synchronizing data entry between the platform and CRM, PLANCO increased operational efficiency by 25–30 working days per employee for an estimated value of $15,000 a year. Thanks to an improved user experience, traffic on the external platform increased from 300 to 1,500 unique visits per month. Finally, the new automated billing process increased CTEQ's annual revenue by $250,000.