

Case study: Implementing a CRM for the CTEQ

The Centre de transfert d'entreprise du Québec (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 useful tools to discover and cultivate new opportunities. After a period of rapid growth, the CTEQ needed to standardize its processes, systems, data, and users with a CRM solution that could meet its current needs and support future growth.

The CTEQ called on PLANCO to implement a new system without sacrificing the quality of its services during the transition. Thankfully, PLANCO's digital transformation services met the CTEQ's needs perfectly.

Improving CRM performance

The CTEQ needed to improve its existing systems to meet new requirements, simplify tasks for its advisors, and ensure the organization was effectively managed.

While the CTEQ has only 20 employees, it covers 17 administrative regions and manages more than 16,000 users. The organization planned to synchronize its CRM with its existing systems by adding nine new modules and standardizing user data. High-quality data would serve as performance indicators for the project's success. These objectives all worked toward the CTEQ's goal of increased operational efficiency.

The CTEQ's digital transformation would involve:

- Vtiger CRM software
- PHP
- Script
- SQL
- Agile

Why PLANCO?

The CTEQ needed a company specializing in operations management system implementation to restructure and add supplementary modules to its CRM. When

PLANCO proposed a transformation strategy based on CTEQ's extant systems, the choice was obvious. Moreover, PLANCO had already demonstrated its vast experience in project management and supporting businesses throughout their digital transformations.

Among other highlights, PLANCO's proposal minimized the operational impact of the transition and let the CTEQ continue using its current CRM. PLANCO's experts would manage all aspects of project delivery, create a plan custom-built for the organization's needs, and improve operations as quickly as possible.

Challenges

PLANCO's tasks included planning, analysis, development, quality control, change management, and user training. Its goal was to standardize the CRM and client data to align fully with the CTEQ's work processes.

The CTEQ's expectations

One of the CTEQ's main goals was data standardization, which would let it extract performance indicators. Secondly, the organization needed the tools to train its users on the new CRM and work processes. Thirdly, the CTEQ expected PLANCO's solution to serve as the first phase of a new business model to be implemented in the future.

Results

As with any digital transformation project, it was crucial that PLANCO quickly grasp the client's business model, analyze the current situation, and define objectives. Once these goals were fleshed out, PLANCO could develop a proposal. The proposed solution aligned with PLANCO's digital transformation philosophy by putting both human and operational aspects front and center.

Thanks to an improved CRM, employees could now extract performance indicators based on actual data, not interpretation. The change improved efficiency by 95%, meaning 3 hours of work instead of 70! Additionally, the operational efficiency of the CTEQ's advisors increased 30% thanks to less time spent on data entry—almost the equivalent of a full-time job.

Conclusion

In only nine months, the CTEQ gained an upgraded CRM, acquired the ability to extract precise performance indicators, improved its operations management, and reclaimed a substantial number of working hours. Most importantly, its users

were equipped with the tools and training to reap all the benefits of this digital transformation.

PLANCO and its team of digital transformation experts had achieved everything the CTEQ set out to accomplish!