



## CASE STUDY



Building a new integrated CRM



### OVERVIEW

Headquartered in West Bromwich, West Midlands, Langley Compass Group provides EPoS, payment solutions, broadband and telecoms, software development and IT services. We were using costly third-part CRM and e-signature solutions and made the decision to develop our own in-house solution.



### THE CHALLENGE

We were spending £20K per year on Salesforce and DocuSign so the challenge was simple: could we develop our own integrated platform? It needed to be as feature rich as these third-party systems but work better for us, give us additional functionality, and generate significant cost savings in the long term.



### THE BRIEF

Build a fully functioning, flexible and feature-rich CRM platform with an integrated e-signature module that is built in a way that we could take to market as a standalone product.



### THE SOLUTION

Rather than simply cloning our existing solutions, we took considerable time to broaden our horizons and assess what additional features we could add to make this a better platform for us.

Once the scope, budget and timeframe of the project had been agreed, we could then proceed to the design and build stage. In a little over nine months, the entire first phase was complete. After a rigorous testing period, the sales team started using it in October 2024 and, within a month, had fully migrated away from their existing solutions.

Leads and opportunities can be created, assigned, tracked and forecasted. A wide range of financial information is available from a clean, intuitive and customisable dashboard. And once an opportunity has become an order, the contract can be digitally sent, signed and stored within the CRM. More than that, the system connects with Xero, so invoices can be raised and payments tracked automatically.

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All client and supplier information is securely kept within the CRM with full logs of all contact, so we can manage our points of contact efficiently and from one place.

In short, we have built a fully functioning, feature-rich CRM platform with an integrated e-signature module that connects direct to Xero, Companies House and Outlook 365, making our entire customer relationship workflow seamless and saves us £20k per year on third-party solutions.

Work has already started on phase two: designing, building and integrating an IT Helpdesk Ticketing Solution with call logging. Not only will this further reduce our ongoing costs of using third-party platforms but it will elevate our CRM to a full ERP platform that will become the backbone of our operations. More than that, we have also created a product that we can use to generate income, not just save it.

Having our own system not only gives us greater control and flexibility, but also means that we can enhance our customer experience.



SCOPE



PLAN



DESIGN



CODE



TEST



DEPLOY



SUPPORT