



BDO Seidman

Information Sharing for 9,000 Employees and Alliance Members

Company Profile

Headquarters

Chicago, IL

Company Fact

The world's fifth largest accounting firm

Users

Rolling out to 9,000 employees and partners

Solution

Sugar Professional On-Site

Key CRM Requirements

Lead Management, Portal Capabilities, Self-Service

For large companies, one of the chief competitive threats is inertia. Oftentimes, companies become so large and complex it becomes nearly impossible to execute strategy. Undoubtedly, BDO Seidman is a very large company as the world's fifth largest accounting firm with offices in 35 locations across the United States, and hundreds of business and technology partners. Yet, unlike many other large enterprises, BDO remains nimble by exploiting communications and information technology to keep employees, partners and customers on the same page.

Solution Requirements

One of BDO Seidman's major revenue streams is through Alliance members—hundreds of local and regional accounting firms who work in partnership with the company. Similar to other companies who derive revenue through an indirect channel, BDO Seidman faced channel conflict issues when teams did not work together. "We needed a process to more effectively communicate with our alliance members," says Valerie Kozikowski, a partner at BDO Seidman.

BDO leaders crafted a vision in which the thousands of employees in BDO headquarters could communicate with up to 9,000 Alliance member employees through a web portal framework. Information could also be shared with the BDO Business Resource Network, an Alliance division specializing in technology consulting and implementation.

Managing Complexity through Simplicity

In undertaking a vendor evaluation, BDO focused on flexibility and customization to meet the needs of the various constituencies. "The application needed to contain strong access control and security features that could be adjusted based on the company's needs," says Kozikowski. "Because some of our needs are unique in that we're connecting people who can be customers or referral sources, we needed a lot of flexibility. That was our No. 1 selection criteria."

BDO Seidman pursued CRM initiatives before and learned some valuable lessons. "Complexity in the application can really kill user adoption," says Kozikowski. "If users do not find the application to be responsive and helpful in their daily jobs, they simply will not use it. Thus, the first criterion for the CRM initiative was a simple and intuitive user interface. We were looking for something with a very clean and simple user interface we could tailor without making a lot of changes," says Kozikowski.

"SugarCRM® delivers the flexibility we need to deploy a unique solution across our entire U.S. operation."

Valerie Kozikowski
Partner
BDO Seidman

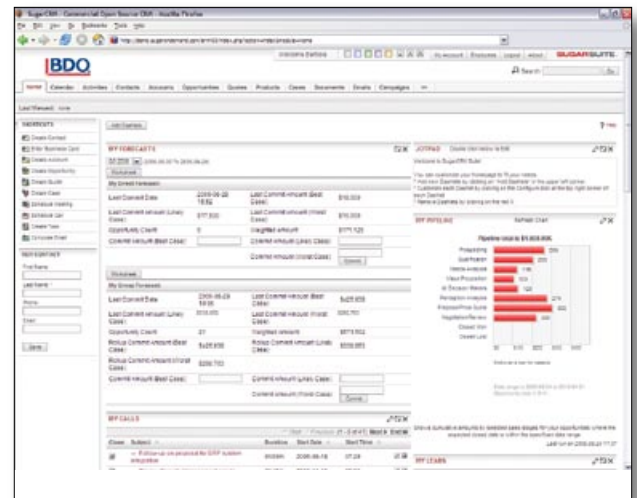
Introducing BDO Link

Based on these measures, BDO Seidman selected Sugar Professional™ On-Site for its solution. “Our CRM requirements are quite complex because of the size of the project and the different members who will be accessing the system. After a thorough evaluation, we decided that SugarCRM was the right product to deliver a web-enabled application that would meet our scalability, customization and integration needs,” says Kozikowski.

After making the decision to use Sugar Professional, BDO Seidman worked with the SugarCRM team to implement the application for employees and Alliance members. Rather than relying on manual processes, BDO Seidman Alliance members can now access the applications—named BDO Link—from a web browser and share leads and contacts as well as a description of opportunities. Alliance members also rely on the employee directory which allows them to contact counterparts within BDO Seidman who can help them with an opportunity or work with them to resolve a client issue. BDO Link maintains tight security and access control rules which are maintained by the company. This allows the company to restrict access or share information based on geography, position or account. With BDO Link, communications between dispersed teams can be initiated with a few simple mouse clicks. This leads to better communication across the company and a more responsive organization.

Continuing Education

BDO Link has enjoyed great success since its initial roll-out, yet Kozikowski and team are not taking any chances. They are traveling the country to educate and train Alliance members about the benefits of the application. “By nature, CPAs are not technical people and can be intimidated by technology,” says Kozikowski. “It is an evolutionary process. Our job now is to show them how



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easy it is to use and how much more effective and successful they can be with BDO Link.”

The BDO Seidman team is positive about the adoption of BDO Link thus far and optimistic about the benefits the application will deliver in the future. “SugarCRM delivers the flexibility we need to deploy a unique solution across our entire U.S. operation,” says Kozikowski. “The ease-of-use of the SugarCRM application and its strong CRM capabilities means that BDO Seidman will be able to improve information sharing and deliver improved reporting capabilities across employee teams and the BDO Seidman Alliance Network.”