

Facilitating a Large-Scale Digital Transformation for Ad Valorem

Ad Valorem engaged Bluewave to replace their existing systems with a large-scale, Salesforce powered, digital solution in order to revolutionise the way that their sales and marketing teams enhanced customer experience, managed leads and oversaw opportunities.

The conversation started in the first quarter of 2021 and the project was live by October 2021. Read about how we conducted this comprehensive digital transformation below.

About Ad Valorem

Based in Milton Keynes, Ad Valorem is one of the region's leading firms of chartered certified accountants. The award winning accountancy firm has a strong reputation for helping clients in all aspects of business, supporting in achieving their goals by providing innovative solutions and financial advice, always with a collaborative approach.



The Challenge

Initially, Ad Valorem's existing systems lacked available audit information with regards to records and fields. There was also no single source of truth for customer data, as the firm was instead using several different systems. This led to a lack of visibility overall, which affected the organisation's lead and opportunity pipeline. Ad Valorem also employs a significant number of remote workers, and each employee was using their own spreadsheet, resulting in managers having to collate and merge these sheets for senior level reporting, which also had a negative impact on lead and opportunity pipelines.

On top of that, there were limited document generation capabilities within Ad Valorem's existing systems. Team members found the firm's research and development process a little

difficult to complete, as it was housed within a separate system and only provided basic workflow automation, without integration with any other systems they used.



The Solution

Ad Valorem needed a large system overhaul and partnered with Bluewave in order to carry out this vast digital transformation. Ad Valorem wanted to replace their current system and build something more modern and efficient. This would involve the use of Salesforce Sales Cloud – the best contact and opportunity management tool for sales teams, which utilises process automation to help sales teams grow relationships and close deals at any time, from anywhere. Additionally, the Bluewave team also deployed Pardot – Salesforce’s award-winning B2B marketing automation solution, designed to unite an organisation’s Sales and Marketing teams, providing a single source of truth for customer data.



Rounding off the list was Salesforce Einstein – the first comprehensive AI for CRM. Einstein is a data analytics platform that uses an integrated set of artificial intelligence technologies to help users visualise the activity occurring in their Salesforce environment. In other words, it makes Salesforce’s existing solutions even smarter and more efficient.

By utilising this trinity of Salesforce solutions, members of Ad Valorem’s sales team would have account, contact, lead, and opportunity management handled in an easy-to-navigate solution. These products would also automate document generation, help with collaboration, and provide one inbox for all information to flow through. Additionally, the firm’s marketing team would have access to reports, dashboards, and connected campaigns, making outreach, and content management, as well as analytics, a lot easier.



The Process

Ad Valorem required a large-scale digital transformation, with many moving, interconnected parts. Firstly, our consultants developed a custom audit history solution to cater for key objects, this would provide indefinite tracking on unlimited fields. The solution can also be archived systematically, if required in the future, and can get around the limitation of standard field tracking, which currently sits at 20 fields per object.

As our experts continued building Ad Valorem's bespoke systems, they integrated Conga Composer and Conga Sign into Salesforce to provide a slick and efficient user interface. This was done to ensure that data used within any documentation is accurate as well as to trigger the automatic closure of a sales opportunity once engagement documents were signed.



The transformation also involved the enablement of person accounts and account contact Relationships to manage all of Ad Valorem's client information, where everything would be driven centrally from Salesforce. Our technical team also built workflow automation within Salesforce too, in order to use configurable templates (also known as custom objects) to manage internal workflows, again, using Salesforce. This would allow the firm's employees to manage teams, stages, and steps to ensure they adhere to the work type of any given product.

The Bluewave Way™

Our project with Ad Valorem required us to work alongside three of their partners: Conga, CCH, and Xero Integrations. As so many other voices were involved, communication was crucial to the success of this transformation – a skill that Bluewave consultants and project managers are known for.

Throughout this engagement, our project managers experienced fantastic levels of engagement from the key stakeholders within the firm. This is something that they were quick to shout out when asked about the project:

“The relationships that Ad Valorem’s senior management and technical teams established with us really made the project. We had a strong point of contact that ensured the communication was straightforward. Together, we made a fantastic team.” – **Project Manager at Bluewave**

“Ad Valorem’s teams were involved from day one and stayed very close to us. The firm’s Head of Operations ensured I had the right input from the right people, while also supporting from a technical perspective, as our team built and deployed the bespoke solution. I have to say, it was one of the best solutions I’ve delivered; it was extremely complex – there was a lot happening with many moving parts – but being able to see it be deployed, and go live as it did was a great experience.” – **Senior Salesforce Consultant at Bluewave**



Such a complex solution would require training to get to grips with the large scale process and system shift. Ad Valorem began upskilling their employees before the engagement, via Trail Mixes that we sent to them, this meant that there was already a baseline of knowledge established before technical training from our side could begin.

“When we delivered the training, it was quite different to what I’ve done with other clients. Due to the foundation they had already established, they could come to me and ask for training on specific parts of the solution. The training became more of a handover and by the end of the project, they were really strong in Salesforce knowledge, so they could handle a lot of things in-house.” – **Senior Salesforce Consultant at Bluewave**

Our consultants also spoke highly of the Ad Valorem team and their enthusiasm for the project:

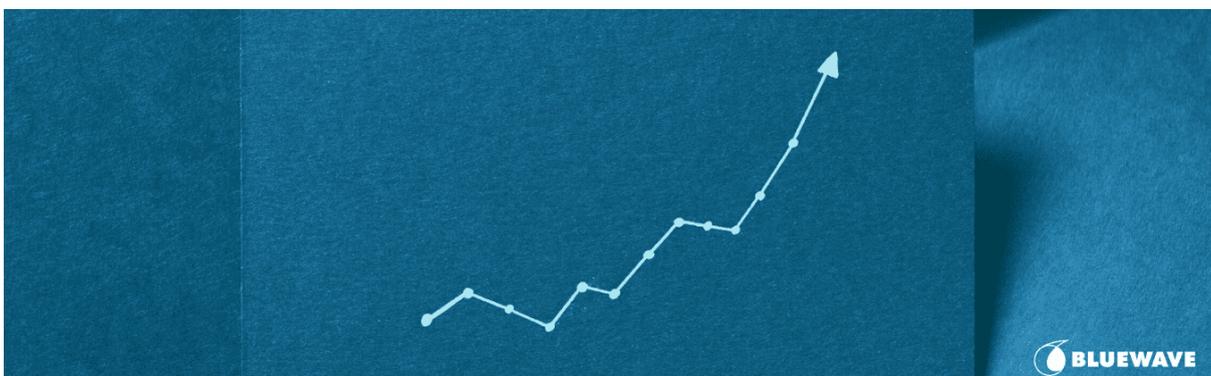
“It was great to see the Ad Valorem team take an interest in what we were doing. They really responded to our training, and spent a lot of time upskilling so they could relate to us and understand the language we used as well as the technology we were delivering. They maintained that professional structure throughout and it made the whole experience a lot easier.” – **Senior Salesforce Consultant at Bluewave**



The Results

By October 2021, our consultants had completed the project, leaving Ad Valorem with a solution which allows the Sales, Marketing, R&D and Practice team to work within a single system; able to engage and collaborate regarding all clients and opportunities. The successful completion of this project allowed the decommissioning of four separate systems which were required by most users within the firm. These were replaced by a fully integrated, Salesforce powered, bespoke solution.

As a result of our collaborative work, Ad Valorem’s senior management team now have the single source of truth they need to understand the activities, performance, and progress of their sales and marketing teams, as well as their clients. Real-time reporting via Salesforce Einstein has eliminated the need for each manager to spend hours collating information for senior management reporting.



Additional benefits include the fact that documents can be generated and signed efficiently, and opportunities are now automatically closed once a document is signed. This level of automation frees up Ad Valorem’s sales team to focus on their pipeline. Plus, now that the

firm's users have the ability to see billing invoices within Salesforce, they no longer have to manually look them up in Xero, therefore streamlining the whole experience.

Ad Valorem's research and development team – a major part of the business – has seen a huge boost in efficiency when following steps required in the HMRC R&D process. Instant reporting allows all levels of the hierarchy to stay updated about R&D progress, ensuring there are no bottlenecks or surprises within the lead, opportunity and claim pipeline.



Customer Feedback

Ad Valorem graded their overall experience with us as five stars and spoke highly of their experience with us:

“Our experience with Bluewave has been fantastic in all aspects. The team supported us in ensuring our business processes have merged across into Salesforce successfully. We could not recommend them enough; the time they took to understand our business, then recommend and implement a solution will allow us to grow as a company.” – Head of Operations at Ad Valorem

On top of this feedback, they also rated our engagement with them, our team's communication and performance, how we scoped the engagement and how we applied our knowledge of Salesforce products to meet their needs at five stars. Additionally, Ad Valorem stated that the outcome of the project and their ability to maintain the system we set going forward couldn't have been stronger either, awarding us five stars in those categories too. When feeding back their experiences to Salesforce, they also awarded us five stars for return on investment – something that the members of our team that worked on this project were very pleased about.



Through the combined efforts of everyone involved, the system is now live as of October 2021 and Ad Valorem have continued to highlight their positive experiences with Salesforce via their social channels and events. We are very pleased with the result of this partnership.

“The implementation of Salesforce has been a huge investment, both financially and with our team’s time. Having launched in October 2021 we are already starting to see the benefits of holding our customer information in one location, providing visibility across departments and efficiency through workflow and communication. Bluewave provided an amazing service from day one and succeeded in delivering the system we dreamed of.” – Director at Ad Valorem

Bluewave are experts in efficient and comprehensive digital transformation. Please [get in touch](#) to learn how our specialist offerings can assist your organisation in reaching its goals.