

# Case Study – Clegg Associates



Clegg Associates are a well respected practice of Civil and Structural consulting engineers. They offer services across a wide range of business sectors including:

- Residential
- Housing Developments
- Health Sector
- Industrial
- Green energy
- Precast
- Historic and conservation
- Education
- Commercial
- Leisure
- Urban
- Water Industry

Clegg Associates asked Graham Hodges to help to facilitate their desire for growth.

From the beginning it was clear that the team at Clegg Associates were fully committed and bought into what was going to be needed to drive ongoing growth.

The start point was to examine their Sales & Marketing activities and put together a plan. This involved:

- A review of current marketing activity, adjusting it to improve returns;
- Putting in a measurement process whereby the results of each marketing channel could be measured and adjusted as necessary;
- The initiation of a plan of work aimed at driving up the networking activity in particular.

The key to the success of this was a regular review process whereby the relative successes of each activity was measured and reviewed and future work adjusted to maximise impact.

As part of this initial process it became clear that Clegg Associates' digital presence was delivering almost no leads at all. Graham arranged for an Associate to carry out a complete review of their digital presence and draw up a plan of improvement. Even though, due to the nature of the business, it was felt that only small work was likely to be obtained through improved web presence it was still felt worth doing. Very quickly it became apparent that a significant amount of new business was coming through their web-site. Since then, this source of leads has grown and grown, albeit requiring constant activity to keep the site up to date and ensure the SEO is as effective as possible.

At this point it was clear that the growth was being achieved. The team then met to develop the strategy going forward. One clear element of this was that of ensuring that the organisation infrastructure was fit for purpose. Throughout the growth process Graham has emphasised the need to ensure that the company can actually deliver the increased sales, this involved looking at a range of areas:

- What staff were likely to be needed and when, recruiting new people as needed;
- Ensuring the invoicing and credit control procedures were robust and functioning effectively;
- Ensuring the quotation and order processes were slick;
- Examining Customer Service to ensure that customers received best service at all times;
- Reviewing the company's admin procedures to ensure they were working well.

One key milestone required for the growth was to move premises. This was required so the new offices would be better located for potential new recruits but also to be more centrally located to maximise the networking capabilities. The office move was very effectively managed by the team and has delivered the desired results.

Throughout the process the team have been very aware of the need for change, both in terms of business practises but also in culture and the way everyone worked together. In many ways these changes were at least as great as the business process changes.

Mike, one of the Directors said *"Graham has constantly emphasised with us the need to ensure that we not allow sales to outstrip our ability to deliver. As a result we have continually been able to ensure that we can meet our customers' demands. This has meant that our staff have constantly been well motivated and our level of customer complaints has been minimal"*.

Right from the beginning the Directors have demonstrated their complete commitment to keeping on the growth path. A senior Associate has been dedicated to driving the Sales & Marketing activities and this has meant that the Sales pipeline has constantly grown and been effectively monitored and managed.

Another key factor in Clegg Associates' success has been the implementation of a financial forecasting and management review process. This process has become the corner-stone upon which the business is managed. Every month there is a board meeting, conducted with Graham Hodges, The Clegg Associates management team and their accountant.

As well as reviewing the month's figures, discussing the highs and lows, the team re-forecast going forward. Management Actions are taken based on up-to-date knowledge of their financial position and expected future activity.

John, one of the Directors said *"We now feel much more in control, not just of our finances but of our business as a whole. When we take our business decisions we are now taking them against a backdrop of knowledge and although we still don't have a crystal ball we are much better able to predict the impact on our business."*

The Management Team have used Graham's advice on many occasions, involving him in all of their main business decisions and from time to time asking him to help them with specific activities which might range from reviewing the project tracking and planning processes through to assisting with defining roles for new staff.

Clegg Associates' growth plan and process has encompassed much, much more than simply putting a Sales & Marketing Plan together. Some of the key points that Graham Hodges has been able to work with them on have included:

- Effective measurement of Sales and Marketing activity, adjusting accordingly;
- Creating and operating a robust management process, particularly in regular monitoring of finances;
- Creating Business Plans, and using them to steer their activity;
- Understanding the culture change and personal changes that come from being in control of a bigger and bigger business;
- Recognising the need to ensure that all of the structural changes are made to the business that ensure the growth is deliverable and manageable;
- Involving other associates where particular skills are needed.

The absolute key to Clegg Associates' success has been and continues to be the complete commitment of all of the team.

As Mike said *"We knew that when we embarked on our growth programme there was going to be some challenging times ahead. Graham's experience has been absolutely crucial in steering us through the change process and ensuring we have kept on track. We have more than doubled the turnover of our business in the very short time that Graham has been working with us and we are confident that this success will continue"*.

**If you would like to know more about this project, contact Graham Hodges & Associates:**

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