



asdon
crm

A Playbook for Business Growth with Microsoft Dynamics 365

(NI/ROI)





CONTENTS

- 3** Preparing your organisation for future growth
- 5** Four signs you've outgrown your current CRM system
- 10** What's holding you back?
- 14** Powering business evolution and growth with Microsoft Dynamics 365
- 24** Getting up and running – the Preact approach

INTRODUCTION

PREPARING YOUR ORGANISATION FOR FUTURE GROWTH

Most business owners and senior managers pay close attention to the strategic side of growth – the ‘where’, ‘when’ and ‘how’. But technology and infrastructure that was well suited to historic challenges may buckle under the strain of new demands.

This is especially true of CRM systems.

If your company is experiencing fast-paced growth, or upheaval in your market, then using CRM to weather the changes your business is going through is a smart choice.

But growth often imposes the need for new capabilities and functionality. And all too often, business leaders realise their existing technology is no longer capable of keeping pace with fast evolving requirements.

Quite simply, they've outgrown their existing CRM solution.

In this guide, we explore some of the tell-tale signs that it's time to refresh your CRM strategy to expand scalability and achieve better, more customer-centric results. And we reveal why technical concerns are not always the most important reason to revise your plans.

Along the way we explore some of the risks and concerns that may well be holding you back - and approaches you can take to make sure that your next CRM implementation is a success.

We also discuss why making a move to Microsoft Dynamics 365 and its suite of connected business applications will help you advance beyond a traditional CRM system to accelerate your digital transformation. Making it possible to unify your people and processes to drive business growth. And, gain insight and clarity about your customer's needs that will spur innovation.

Reaping the rewards of integrated business applications

Re-defining how your business performs depends on being able to constantly change and find better ways of doing things. While good customer service will always require a personal touch, technology is helping growing businesses to consolidate their customer data, develop smarter processes and be more responsive than ever before.

In fast-paced markets, technology is the key to keeping up and, thanks to the cloud, solutions that were previously only accessible to large companies with big budgets are now readily available, and affordable, to all.

Yet fast-growing organisations also need exceptional long-term value and scalability from the technology they deploy. For them, delivering an amazing customer experience is just part of the challenge. They also require their technology investments to improve productivity and organisational agility.

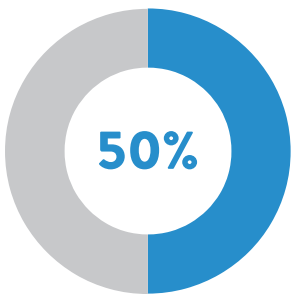
Businesses in growth also need to break down traditional data silos to manage customers and other relationships across multiple business units in more efficient ways.

Most businesses have a wealth of data about their customers and processes, but often struggle to bring it all together to uncover insights and boost productivity that will take their business forward.

Throughout this guide you'll hear from some of the many companies we've worked with. Having successfully replaced incumbent CRM systems that were constraining their growth, they talk frankly about the results they've quickly achieved with Microsoft Dynamics 365.

Their success stories demonstrate how it is possible to go beyond basic CRM software to initiate digital transformation and achieve greater agility through more connected ways of working that creates sustainable growth.

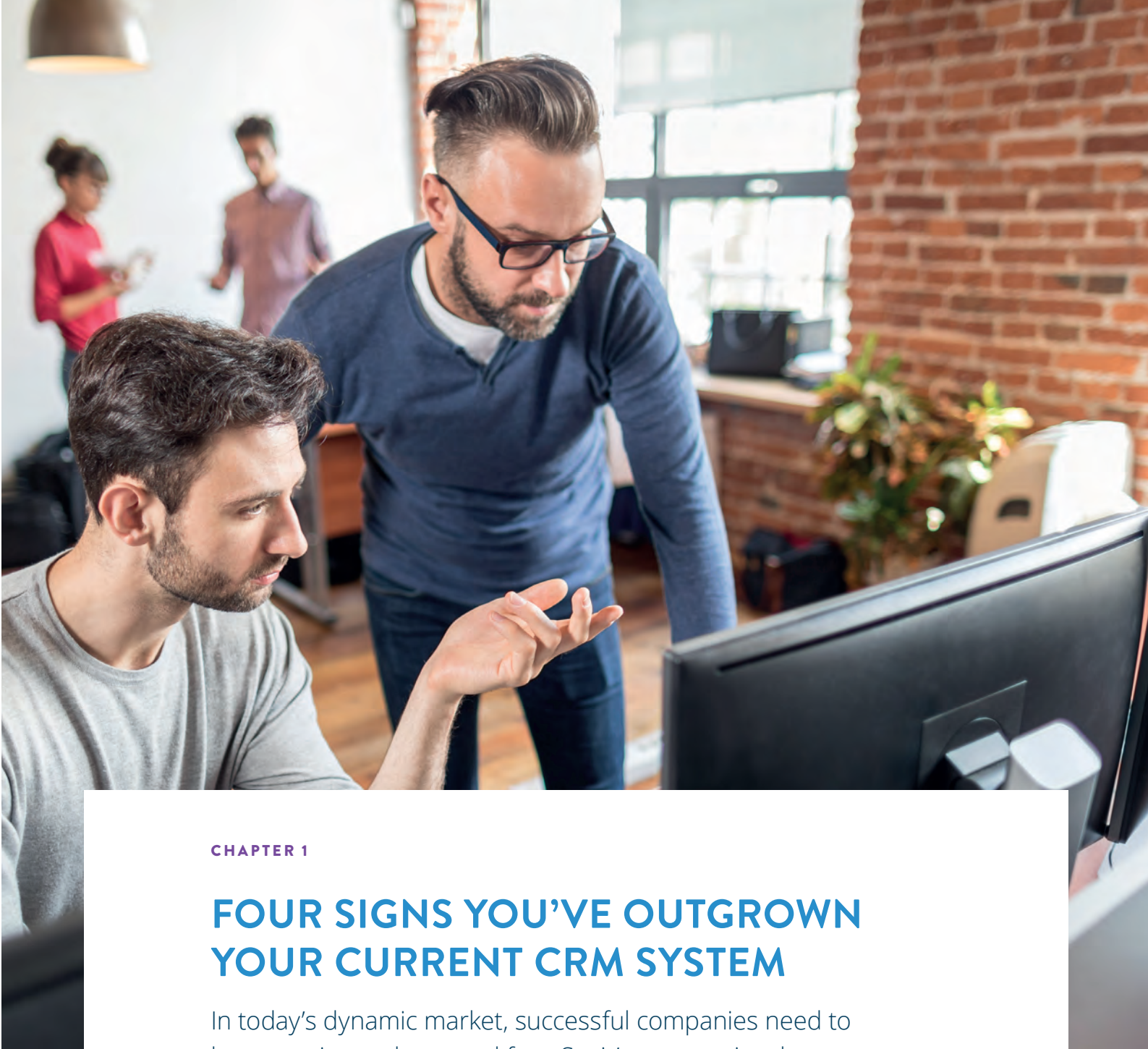
The benefits of getting CRM right are well-documented. Bain & Company research has found that a 5% increase in customer retention boosts lifetime customer profits by 50%, on average, across most industries.



Boost in lifetime customer profits with 5% increase in customer retention

“In the age of the customer, good customer experiences are the only sources of competitive differentiation. CRM has the potential to transform customer relationships, but companies have only just started to tap into the true power of these solutions.”

Forrester - Five Key CRM Trends for 2018 That Shape How Companies Drive Relationship and Revenue



CHAPTER 1

FOUR SIGNS YOU’VE OUTGROWN YOUR CURRENT CRM SYSTEM

In today’s dynamic market, successful companies need to be proactive and respond fast. So, it’s no surprise that many executives are continually reviewing their CRM strategy.

CRM applications help companies understand who their customers are and what they want. And with customers increasingly interacting across multiple channels, it’s imperative that employees have the right information at their fingertips at every point in a relationship – sales, services, billing, fulfilment – for highly personalised interactions.

While the motivations for embarking on a new CRM approach may vary, in our experience there are four revealing signs which demonstrate that an existing system is falling short of what is needed.



PAIN POINT #1 – Inadequate reporting

Senior managers and directors are constantly on the lookout for business intelligence and depend on critical data – sales forecasts, cost of servicing customers, returns from marketing activities and so forth – to make critical business decisions. But many experience frustration in getting complete and accurate data from their current CRM system, or waiting for data to be supplied.

The consequence? Decisions based on gut feel due to a lack of trusted data, inconsistent sales projections that impacts cash flow management, time wasted sifting through data that may already be out of date, and no clear visibility of key business metrics.

All of which makes it extremely difficult, and in some instances impossible, to effectively plan and monitor performance.



PAIN POINT #2 – Inefficient processes

Getting things done frequently involves repetitive manual effort and duplication – and that equates to inefficient processing costs and uncompetitive operations. A scenario that isn't helped if your CRM system can't be integrated with other data sources – such as ERP, business intelligence or email marketing – which slows the pace of business.

Future growth is being jeopardised as current processes can't be scaled and consume too many resources which harms a company's ability to be competitive and agile.

“Microsoft Dynamics 365 gives us end-to-end processing all the way from lead through to sales to project delivery and post-sales servicing. Having these processes connected is the lifeblood running through our business as our team can access all the information they need in one place. Dynamics 365 has proved instrumental in helping the company grow and sustain success during a period of unprecedented change in our industry.”

Darren Oliver, Technical Director, BeBa Energy UK



"We've seen a sea change in how we report. Previously this was a manual process and often subjective, but it is now entirely based on facts being driven by CRM data. We now take the view that if the data isn't in Dynamics 365, it won't be included in our reporting.

In the past, our directors would spend several hours every month updating our finance team about the timings for on-site work delivered. All this data is now available to Finance in real-time through Dynamics 365 and this alone has saved in excess of 20 hours each month across our companies. For the first time in the Group's history, I'm now able to take an accurate group-wide pipeline report into our board meetings."

Justin Bass, Special Projects Director, Fourfront Group



PAIN POINT #3 – Inconsistent customer experiences

Poor quality data and unconnected data silos are major barriers to better service delivery and customer-centric processes.

When customer events are tracked in other systems but aren't connected to CRM it prevents anyone from easily seeing the full relationship picture in one place. Sales detail is in one place, projects are in another, order history, email marketing and service cases...you get the picture.

Consolidating or connecting these data sources will empower all teams to do their best work and result in a better experience for all customers.

“Thanks to Microsoft Dynamics 365 we’ve removed so many bottlenecks from our processes and these now flow much more efficiently without the various disconnects that we previously experienced. It means that when a customer phones us we can find all the information we need in one place which is helping us to deliver a better service. Our field-based team can quickly log-in to and add notes when they attend a customer site, or when they work from home, which helps to keep everyone in the loop and it improves the sharing of information throughout the business.”

Tracy Meakins, Managing Director, Able Canopies



PAIN POINT #4 – Staff are less productive on the road

While CRM maybe supporting office-based staff, mobile workers are simply not seeing the benefits.

In the age of the mobile workforce, being able to access relationship information, business processes and reports anywhere and on-demand from phones, tablets and laptops is essential. Without this, teams can't get the last-minute information they need to tailor sales pitches, or initiate and complete processes on the spot.

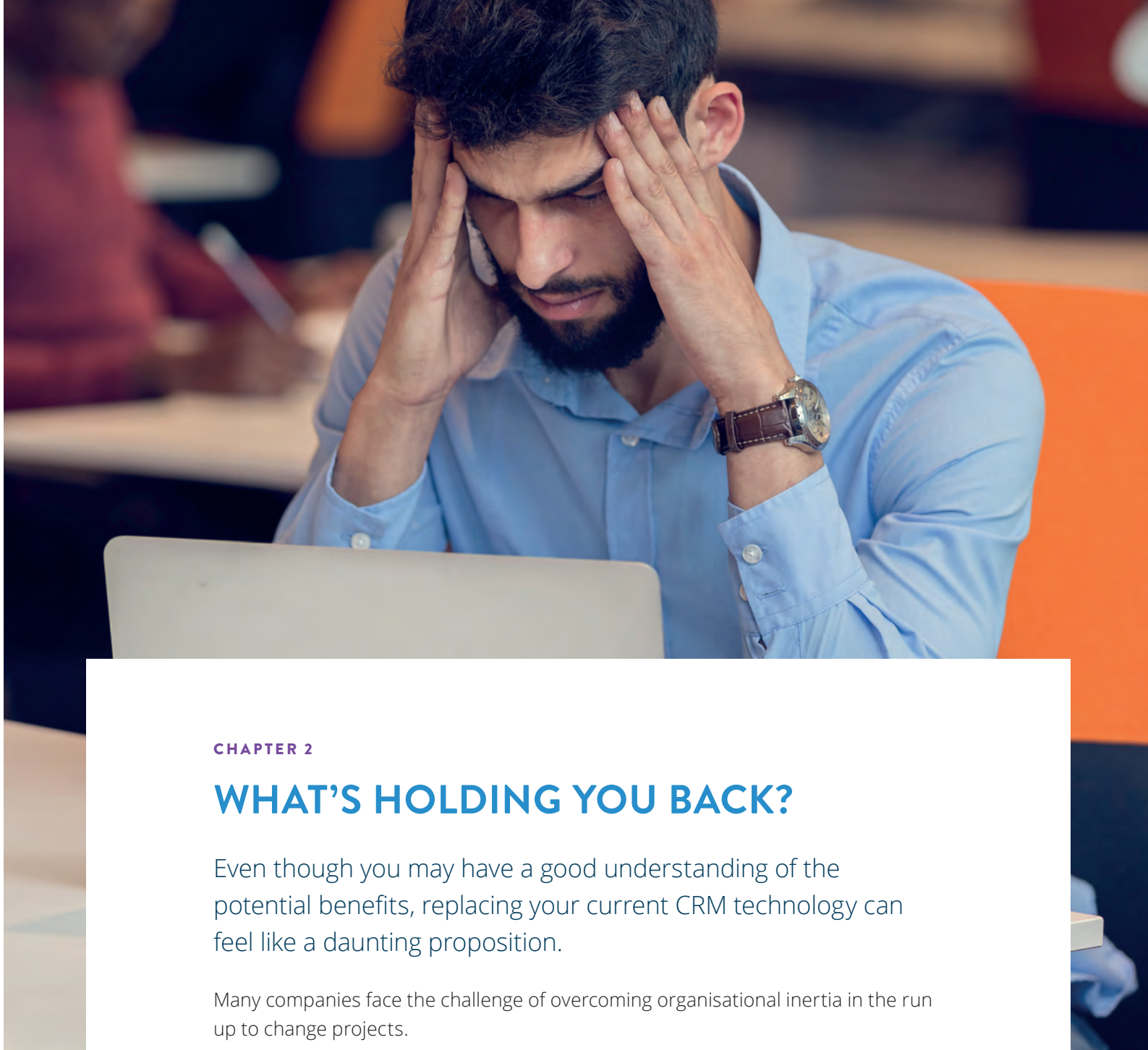
Everything has to wait until they're back at base – or home – and that has a big impact on productivity and timeliness of responses for customers.



THE MATTHEW PROJECT

"Our coaches and mentors are now equipped with Surface Pro devices. When they meet prospective applicants, they use Dynamics 365 in offline mode to electronically complete the documentation that is required to enrol an individual. This process involves multiple templates and various forms which must be completed and signed before eligibility can be confirmed. In some of our other projects we'd encountered challenges with data collection but using this technology has proved to be a very positive experience for all parties."

Malin Holm, Data Lead, The Matthew Project



CHAPTER 2

WHAT'S HOLDING YOU BACK?

Even though you may have a good understanding of the potential benefits, replacing your current CRM technology can feel like a daunting proposition.

Many companies face the challenge of overcoming organisational inertia in the run up to change projects.

All too often, it's tempting to stick with familiar 'business as usual' ways of working. Despite the fact that existing software may be slow, hard to navigate, or doesn't contain all the data that is needed.

Let's explore some frequent concerns and potential barriers that can get in the way of moving forward with a new solution – creating a state of inertia which ultimately restricts continued business growth.

**CHANGE IS NOT THE PROBLEM –
RESISTANCE TO CHANGE IS THE PROBLEM.**

Cost

This is an obvious barrier, especially when a new system is viewed as a cost centre and potential returns haven't been clearly quantified or evaluated.

But sticking with an existing system that is hampering business growth will quickly have implications for future revenue – loss of market position, loss of competitive agility, missed sales opportunities, higher customer attrition.

Making the move to a new application can also mean the end to costly upgrades and lower ongoing IT overheads – especially if you make the move to the Cloud. Plus, it delivers the future-proofed flexibility that a growing business needs.

Familiarity with existing systems

For all its faults, your current CRM system is familiar – your people are accustomed to working with it, know all its little foibles and they have developed creative manual work-arounds to get things done.

Ripping out an existing CRM system feels like a big deal that won't be popular with users – you're concerned that from their perspective, 'if it ain't broke – why fix it?'.

Taking people out of their comfort zone is a big step – one that requires careful preparation and planning to ensure everyone is fully onboard with the new application right from the get go. This starts with early engagement to make sure that everyone understands why change is needed and what a new solution will deliver for the business, and for them individually.

Change is hard – and disruptive

If recent change projects have been draining – or didn't deliver the expected results – business leaders will be wary about asking battle-weary teams to go through more operational and cultural change.

Diligent management will be required to support your vision for change - ensuring everyone maintains focus and stays productive in their day jobs. As with any project, meticulous planning is crucial and by partnering with a CRM implementation expert they'll be on hand to share their expertise. As with any change project, a new CRM approach requires careful planning.

There's no escaping the fact that change management projects do present challenges. However, it is by implementing this technology that businesses are able to achieve greater levels of performance and scale that didn't previously seem possible.

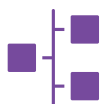
Change Management tips



Define your vision – communicate where your business wants to be with CRM and support this with a series of goals.



Map out your plan – identify early milestones that can be achieved and celebrated.



Assign ownership and timelines – ensure specific people are tasked with clearly defined and timebound goals.



Appoint a project leader – who is accountable, responsible, experienced and who will communicate well with project team members and report on progress.



Define an internal communications strategy – share experiences, learning points and agree how future system change requests will be dealt with.



Take a phased approach – begin with a micro project that will minimise disruption, keep costs manageable and create early successes. Invest in requirements discovery, implementation and user training that will set you up for rapid success.



Will our teams use it?

One of the biggest concerns we encounter when working with companies at the outset of a new CRM implementation, is around the challenge of user adoption.

Based on our experiences and customer success stories we've shared six recommendations to secure user buy-in and drive adoption:

- **Talk to key stakeholders at the discovery stage** - explain the strategy, get them involved, ask what's tricky or time consuming today, discuss how tasks can be better handled to save them time and effort.
- **Start simple and evolve** – focus on one or two high priority teams, and at launch incorporate only the essential features that these groups need. Once they're up and running and confident with the new system, more functions can be switched on as needed.
- **Appoint super users** - who are the 'go to' point when users need help and support. Once your system is bedded in, they will provide ongoing intelligence on how the system needs to be evolved to keep pace with user requests for future change.
- **Test, test and test again** – make sure your new system functions as it should for users from Day 1. Tailoring your system to fit your business will make it relevant and simpler for staff to navigate, and ensure adoption is easier for all.
- **Make sure your system is intuitive to use** - and commit resources to make sure that everyone receives sufficient onboarding training.
- **Connect apps and services you already use** - integration with email, calendars, accounting software or marketing automation services eliminates the double handling of information and allows for intelligent data surfacing. All of which will be very popular with users.



CHAPTER 3

MICROSOFT DYNAMICS 365 – POWERING BUSINESS TRANSFORMATION AND GROWTH

Microsoft Dynamics 365 is all about helping businesses maximise the value of their customer relationships and transforming service delivery.

The technology is the central hub where all customer and business process data is connected and made visible to create valuable insights that will make all the difference to your decision making. In short, your left hand knows what the right is doing.

Through its connected business apps, your entire operation is unified and works together.

Dynamics 365 can be quickly customised and configured to fit unique requirements, allowing organisations to manage any type of data. Used out-of-the-box in a traditional CRM sense, or tailored for bespoke requirements, Microsoft Dynamics 365 is a robust, flexible and highly scalable platform that will power sustained business growth.

7 EXAMPLES OF HOW MICROSOFT DYNAMICS BENEFITS GROWING BUSINESSES

- Connected business apps - that cover everything from sales and customer service to field service, ERP and more.
- Gain real-time insights across all teams and processes by tracking business progress against key performance indicators.
- Embed Microsoft Power BI and use data visualisations that support timely, informed decisions.
- See a complete view of every customer – unify and share relationship detail between teams across virtually any device.
- Transform business processes by creating tailored experiences that help you target and win customers – and keep them for the long-term.
- Connect with familiar Office 365 apps including Microsoft Outlook to surface CRM functions directly from emails.
- Pulls together all your data and business processes in a single, connected solution that is a platform for continued growth.



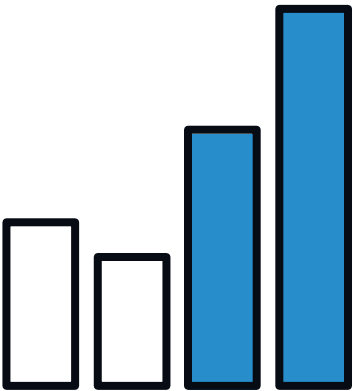
Reporting and analytics

Let's take a closer look at some of the ways that Microsoft Dynamics 365 delivers significant value and payback through four drivers of business growth.

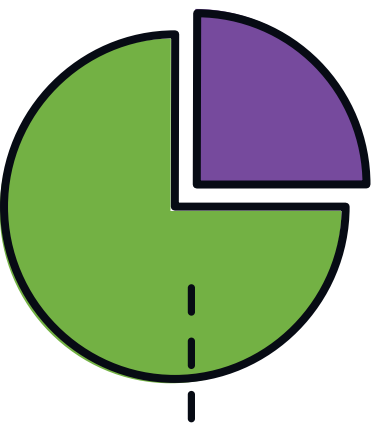
Microsoft Dynamics 365 replaces a patchwork of unconnected systems containing customer data and integrates this with other data sources – like ERP systems, email marketing, services and transactional databases – to create a single source of truth.

This delivers clear visibility of past purchases, the status of active sales opportunities, service issues logged, responses to email campaigns, when contracts expire, what was discussed at the last meeting, and any documents associated with the relationship....we could go on.

With everything accessible through a single interface, managers and teams are able to use in-built dashboards and charts to stay informed - monitoring progress in real-time, instantly checking any detail and being nimble in reacting to new opportunities.



But that's not all. Microsoft Dynamics 365 works with Power BI to embed powerful analytics tools and data visualisations and insights from across the organisation.



Use complete, real-time data to uncover new insights and instantly get answers to questions like 'Is there a blockage in our sales pipeline' or 'How long is it taking to resolve customer issues?'. Accessing live performance reporting makes it easier to uncover hot-spots, identify trends and make timely, informed decisions.

With Dynamics 365 and Power BI you can harness all your data into one place to transform how you report and analyse your data – without having to resort to a data mining specialist.



"One business-critical piece of data that we need to know about our prospects is the length of their current lease-break agreement. Having analysed our data, it was clear this wasn't being consistently tracked. We urgently needed a more robust process that would enforce a rule to make sure this data is captured in CRM before a lead could be qualified.

Similarly, by connecting Dynamics 365 data to Power BI we now have clarity about the state of the sales pipeline as well as start and finish times for our active projects. Combined, this means we can plan our resources far earlier and be proactive in using this insight to optimise start times."

Justin Bass, Special Projects Director, Fourfront Group

Growing efficiently with smarter, scalable processes

For many growing SMBs, improving processes and a need to achieve greater scale are the prime reasons for choosing a new CRM technology.

In many instances, legacy processes – which frequently involve manual steps and duplicated effort – hold businesses back and risk future growth at a time when greater scale has never been more important.

Companies looking to migrate from a basic CRM application such as Act!, often find their operations are transformed by a key feature offered by Microsoft Dynamics 365 – guided process flows which offer clear guidance to reach a successful outcomes with any repeatable process.

Defining each step and stage that each process will need to pass enables users to see at a glance what has happened, and what needs to happen next, to complete this workflow – qualify a sales lead, resolve a service issue, complete an application or convert an opportunity.

Each flow reflects your own business rules and methodology to enrich data and enforce consistency. This can include dynamically adapting process steps to fit different scenarios based on the data entered.

Marketing teams in particular have much to gain from extended processing capabilities. By connecting Dynamics 365 with email marketing, it's possible to automate processes for opt-in and opt-out instructions, and track marketing consent instructions in Dynamics. Connecting with specialist marketing services like ClickDimensions creates wider benefits that include being able to connect survey responses and event attendees.

In a nutshell, smarter processes managed in Dynamics 365 cut administration overheads by automating routine tasks or handling a complex series of steps through workflows that are triggered by an event or action.

A good example of the greater efficiency achievable with Dynamics 365 is how a business can seamlessly connect processes from initial lead to order, without duplicated data entry. Similarly, automated lead nurture campaigns ensure early stage prospects aren't neglected as a series of email messages will drip feed information to drive new sales engagements without the effort of having to manually schedule this sequence of emails.





SOURCE TELECOM

"When it comes to qualifying prospects, the Microsoft Dynamics 365 process bar gives us a very clear structure to follow and the mandatory questions it includes helps our sales team progress these workflows. In doing this, Dynamics has improved the quality of data that we capture and this flows through when our leads are qualified.

"If we speak to people who aren't yet ready to engage us we can move them into a nurture campaign. This will send a series of emails over several weeks or months and with its reporting we can identify when people are responsive to these messages."

Laura Fowler, Business Account Manager, Source Telecom

Connecting with customers

We've already touched on how Dynamics 365 is a hub that creates a single source of truth about each relationship. As a result, customers don't need to repeat themselves when known detail is easily at hand. Crucially, this gives individuals and teams the information they need to deliver a personalised service that will delight customers.

Combined with guided process flows, Dynamics 365 users can easily jump into a customer-facing process that was previously worked on by a colleague and take this through to a successful conclusion.

This is backed up by integrated knowledge capabilities whereby organisations can pool insight by documenting and sharing solutions to frequent issues and questions that increase first call resolution rates. This is another great example of using Dynamics 365 to increase operational scale by eliminating duplication of effort.



Complete customer detail in one place helps everyone identify the most valuable accounts and adhere to service level agreements. Alongside countdown timers and automated alerts, Dynamics 365 offers a variety of functions and controls to help service teams avoid service breaches and protect valuable relationships.

Increasingly, customers prefer to find solutions themselves, or log issues online, rather than phone a support line. Dynamics 365 includes entitlement to deploy an integrated customer portal that can be configured to share knowledge articles - enabling customers to search for answers, log new service requests and update registered information directly in Dynamics 365.

Further integrated channels are available, including web chat and social, which illustrates how Dynamics 365 is helping growing companies rapidly achieve greater scale by serving customers through their preferred channels.

More examples of Dynamics 365 connected processes include an integrated field service module that makes it possible for maintenance and repair visits to be scheduled by raising work orders in same interface, directly from a case record.

To gain a greater understanding of how customers perceive your service, automated surveys invitations can be built into processes and responses tracked in Dynamics 365, for example when a support issue is resolved.



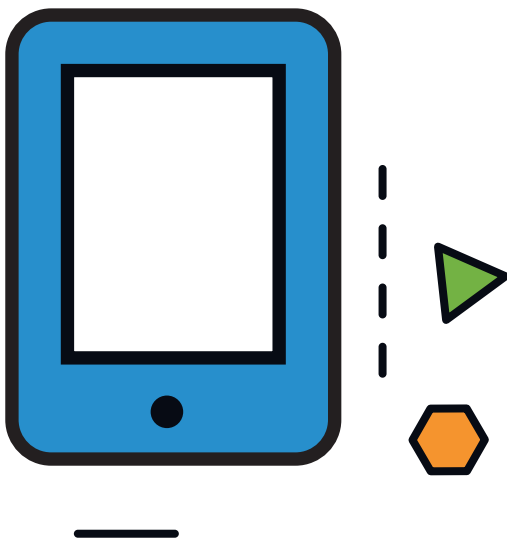
“We had several unconnected systems and without having a real-time picture of where we stood it meant we were lacking clarity to understand when our projects needed to be invoiced. Too much of our time was being consumed in having offline conversations to fill in these gaps as our team sought to understand what work had been completed and confirm when an invoice could be issued.

We now have excellent visibility of our data from sales through to project delivery. We can see what is coming through in terms of project deliverables and anticipate when we will invoice. This means we can look ahead to see if we are on course to hit our revenue targets which gives us greater certainty for what we will be invoicing and the margins involved. The clarity that we now have with Microsoft Dynamics 365 has made a big contribution to improve our planning and the management of our projects.”

John Bancroft, Managing Director, Incognate

Do business anywhere

Empowering your mobile workforce with real-time access to customer data and the capability to undertake business processes on the move, is a productivity gamechanger.



Through Dynamics 365 phone and tablet apps, everyone can do business anywhere and access the same data and capabilities as if they were based in the office.

By eradicating time wasted looking up contact information later, or phoning colleagues back at the office to check detail, individuals can spend more time having meaningful and fully informed conversations – and record any customer interactions without delay.

Particularly beneficial for mobile staff, bringing Dynamics 365 and its process

flows into customer meetings avoids the need for paper-based forms and means that workflows can be immediately initiated to increase the speed of business. No detail is forgotten, and follow-up actions can quickly be set in motion.

Sales or service personnel on the road are able to keep data organised, submit orders as soon as these are agreed, check active deals or service issues, and schedule follow up tasks.

With everyone in the organisation connected to dashboards and other analytics via Dynamics 365 mobile apps, timely commercial discussions can be had – and informed decisions taken on the spot. All of which adds to the pace of business and contributes to business growth.

When critical issues arise, senior managers get instant notifications and can access information from their mobile device to quickly determine what action is needed.

Alongside time saving features like click-to-call and calendar integration, as well as connectivity with email apps, Dynamics 365 has multiple AI capabilities – everything from personalised action cards that help individuals stay on top of actions, to automated prompts that recommended next actions.

For Dynamics 365, its mobile apps are one of the most powerful tools to secure user adoption, provide a better customer service experience and increase sales.



"Our sales team now have immediate access to all the information they need via their mobile devices which is stored in Dynamics 365, OneDrive or Sharepoint. For example, wherever our people are I can have a timely commercial discussion with them about an individual opportunity and we can decide on a strategy. This might be to price a deal to win so following the conversation we can quickly finalise and send out the proposal."

Colin Smith, Sales & Marketing Manager, Drax UK

GETTING UP AND RUNNING – THE PREACT APPROACH

Preact helps businesses of all sizes implement and extract value from Microsoft Dynamics 365. A leading Microsoft CRM Gold Partner, we've been specialising in CRM solutions since 1993, with hundreds of successfully completed projects under our belts.

Helping small and mid-sized businesses, enterprise teams and charitable organisations implement and support Dynamics 365, we support the continued digital transformation of their services and processes.

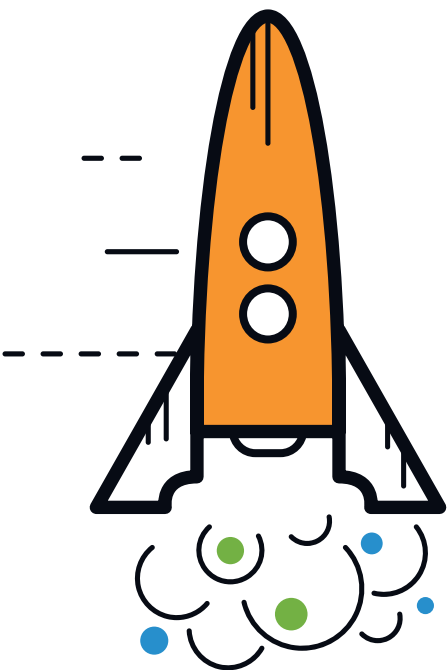
Committed to being the best at what we do, we put our customers first and are dedicated to building business together.

As you'd expect, we offer a wide of CRM services – everything from initial requirements scoping through to data migration, technical consultancy, Dynamics 365 integration, process automation and user training. We also provide an extensive range of support services.

And for any organisation that has hit a brick wall with their project – we offer a Dynamics 365 rescue service that helps businesses get on track.

Many well-known names turn to us for help, guidance and hands-on implementation and our customers include: Hearing Dogs for Deaf People, NHS Blood and Transplant, Mencap, Ryman, Warburtons, Evans Cycles, Kyocera, Weatherbys Private Bank, Bristol Airport, STIHL and Toshiba.

With one of the best implementation methodologies in the business, we confidently believe we have an implementation path to fit any requirement, timeline or budget.



Instant Dynamics 365

Go live with Dynamics 365 now and pay monthly with a low, predictable subscription for licensing and our managed service. We'll implement Dynamics, apply our sales-optimised template and deliver free web training so you can hit the ground running. Make continued improvements to your system using your managed service hours to allocate tasks for our experts to complete.

Quick Start

Typically completed between 10-25 days, this is a fixed price, fixed scope implementation package. Commencing with a high-level requirements scope, we'll build your system, import your data and deliver training. Add our managed service for post-implementation support and additional Dynamics 365 consultancy hours that will help you extend the benefits of your system.

Scope-Led Project

For more complex requirements, we begin with a detailed scoping consultancy to fully define your CRM vision and document your requirements in a statement of work and project charter, and present our solution as a proof of concept.



Business
Continuity

Cloud
Services

Compliance

CRM

Cyber Security

Digital
Dictation

Infrastructure

IT Services

IT Support

Photocopiers

Telecoms

Training

Web
Development

Catering
Supplies

Corporate
Merchandise

FM Supplies

Office Furniture
& Interiors

Office
Supplies

Printing
Services

Shredding
Services

Toners & Inks

Visual &
Presentation

Water &
Coffee Machines

Workwear



asdon
interiors



asdon
technology



asdon
compliance



asdon
office



+44 (0) 28 9267 5114



info@asdongroup.com



www.asdongroup.com