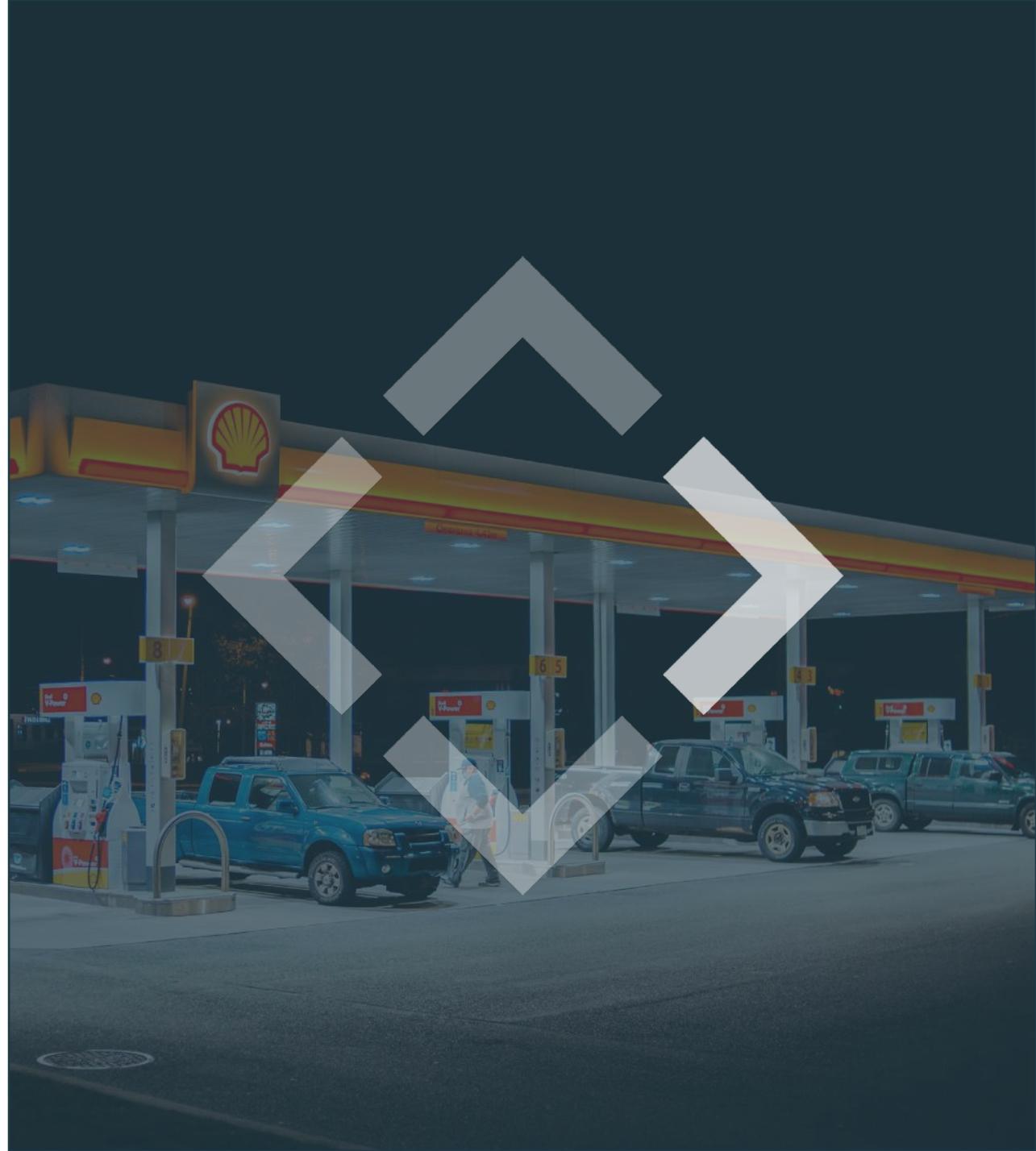


COMPANY CASE STUDY

# RETAIL MOTOR INDUSTRY FEDERATION



## COMPANY BACKGROUND

The Retail Motor Industry Federation (RMI) is the UK's leading automotive trade body, representing franchised car and commercial vehicle dealers, independent garages, bodyshops, motorcycle dealers, petrol retailers, auction houses, and cherished number plate dealers, who provide sales and services to motorists and businesses across the UK.

RMI consists of 8 sub-associations, which each operate in a slightly different way. Until now, all associations were working with an archaic, on-premise membership database. Pragmatiq was engaged initially to design, develop and implement a cloud-based system built on Microsoft Dynamics 365. Once this was successfully delivered, a Phase 2 project was undertaken to extend functionality to other areas within RMI.



### CHALLENGES

- › Previously working with an out-of-date, on-premise membership database
- › Individual associations did not have easy access to their own data
- › Using multiple third-party applications to cope with limitations of the previous system
- › Reporting was time-consuming and management lacked real-time visibility
- › Required a fit-for-purpose cloud-based system which each individual association could access



### SOLUTION

- › Implemented Microsoft Dynamics 365 Sales
- › Accurately reflected the Leads & Opportunities process within the system
- › Implemented Resco, an established integrated mobile platform
- › Developed document generation functionality
- › Implemented Microsoft Dynamics 365 Marketing to achieve marketing goals
- › Implemented Power BI and created management Dashboards & Reports
- › Built functionality to support the Trust my Garage audit process
- › Performed a complex data migration



### BENEFITS

- › Improved access to data
- › Improved overall operational & process efficiency
- › Leaner application landscape
- › Increased insight for decision-making
- › Future-proof system
- › Enhanced data security
- › Increased sales opportunities
- › Better overall experience for Trust my Garage processes and audits

## CHALLENGES



RMI was previously working with an out-of-date, on-premise membership database. This housed all of the data for each association and was controlled by a central administration team, which meant that despite each association operating in a slightly different way, they were restricted to rigid processes due to the legacy software.

Due to the set-up of the old system, individual associations did not have easy access to their own data, meaning that they relied heavily on admin for any insights, reporting, or interactions with members. Due to this laborious process, a large amount of employee time was spent gathering and exporting information.

On top of this, to cope with new processes and limitations of the on-premise system, multiple third-party applications were also utilised. This resulted in data siloes and a high cost of software, which could be better managed with a more efficient system.

For reporting purposes, each month's data was exported out of the database and then manipulated by the administration team. This was time-consuming and meant that there was no real-time visibility of that information until the next report was generated. As a result, management lacked visibility for making strategic business decisions and forecasting; such as the number of new members, retention issues, cancellation, and which recruiters were performing well.

From a Marketing perspective, limited access to data and challenges around keeping member information up-to-date, meant RMI were restricted in what they could achieve. Additionally, integrating other software was a challenge and therefore additional marketing tools were purchased for activities such as sending surveys to vehicle dealers, garages, bodyshops, customers, etc. This meant marketing data was siloed and member information had to be exported out of the system. Any responses that came back, were then manually updated within the membership database.

RMI also faced challenges around the Sales area of the business. The membership database could not handle the CRM element, such as Leads and Opportunities, meaning that an additional system was adopted to manage these areas. Again, this resulted in data siloes and was only available to certain associations. The member sign-up process was manual and inefficient as the system was not reflective of actual tasks. It also relied on the central administration teams to take payment for memberships and process the direct debit mandates.



SOLUTION



After gathering RMI's detailed requirements, Pragmatiq designed and implemented Microsoft Dynamics 365 Sales. This cloud-based system meant that each association could access and manage their own data in real-time, without relying on a central administration team. It was also a crucial requirement that the data for each association was secure and not visible to others, which was possible due to the comprehensive security model within Dynamics.

Pragmatiq then reviewed the way that Leads & Opportunities were managed across associations and reflected this process accurately within the system, to ensure that salespeople had the correct tools and negated the need to work outside of the system. On top of this, it was recognised that the field sales teams were potentially missing opportunities to capture new members. Pragmatiq implemented Resco, an established integrated mobile platform, which allows each salesperson to sign up members, create direct debit mandates, and take payments whilst out in the field. Any member data that was then captured via the mobile application, was also updated in the Dynamics 365 system and enriched the membership record.

A comprehensive membership management module was also implemented to allow each association to manage memberships and subscriptions, renewals, invoicing, direct debit & batch processing, head office & branch hierarchies, and complex fee-paying arrangements. To support this, document generation functionality was developed to automatically create documentation such as direct debits, advanced notices, renewals, and general admin letters.

To achieve the marketing goals, Microsoft Dynamics 365 Marketing was implemented, enabling associations to perform email campaigns, design tailored customer journeys, manage social posting and other marketing tasks.

For event management, the previous database had no way to track and manage events. Functionality within the new system means that event plans, revenue & expenses, speakers, invitations, participation, and sponsorship, can all be managed from one collaborative system.

Alongside this, Pragmatiq implemented Microsoft Power BI and created management dashboards and reports. This provided RMI with visibility across the business and insights specific to each association, such as members and activity around recruitment, retention, new subscriptions, etc.



**“We asked Pragmatiq to help us move from a database we had been using for over ten years, to a bespoke Customer Relationship Management (CRM) system on the Microsoft Dynamics platform.**

**The team at Pragmatiq took their time to understand our complex business needs and while having to build something that suited all our different Associations which in itself came with many challenges, they sensitively came forward with ideas and solutions which helped us not only enhance our processes but maximise our efficiencies.**

**The end result is that the team at Pragmatiq provided us with a platform that not only works for all our Associations and their individual requirements, but one that will grow with us as an organisation.”**

**CHRIS THOMAS - FINANCE DIRECTOR AT THE RETAIL MOTOR INDUSTRY FEDERATION**

## BENEFITS



Through the implementation of our solution, the following benefits were realised:

- › **Improved access to data** – Dynamics 365 Sales does not require a central administration team to exclusively manage it. This means that each association can now access their own data and perform activities in their day-to-day roles, without waiting for admin and reducing the manual workload as a result.
- › **Improved overall operational & process efficiency** – Across RMI and individual associations, there is no longer the need to switch between disparate applications which were previously wasting time. Additionally, the system now accurately reflects the way business is conducted at an association level, meaning that overall operation and process efficiency are improved.
- › **Leaner application landscape** – Implementing this cloud-based system has reduced the number of applications that RMI previously required in their technology landscape. Everything required is now integrated within Dynamics 365, which is mutually beneficial for user adoption, supporting individual software, training new hires, and reducing costs for multiple applications.
- › **Increased insight for decision-making** – Previously, RMI was spending 1 day each month manually exporting and manipulating data to generate reports, which were then not refreshed until the following data export. With Power BI, data is now refreshed in real-time, and management can gain insights and interrogate key figures on a daily basis. This will also highlight areas that need extra focus and improvement, as well as those that are performing well.
- › **Future-proof system** – Moving to a cloud set-up opens up possibilities to implement additional tools such as mobile applications, allows data to flow effectively between applications, and enables staff to easily work remotely without the use of an RDS. On top of this, the interoperability with other Microsoft applications such as Word for documentation templates, Outlook for email tracking, and Excel for data imports, allows RMI to work more effectively using the tools that are within the eco-system and expand upon these where necessary.
- › **Enhanced data security** – We leveraged the security model within Dynamics 365 and customised it to fit the specific requirements of RMI. This ensured confidential data could only be seen by those organisations and people within them, with specific permissions, enhancing overall security and compliance.



“This project was a really good example of how extensive the Dynamics 365 platform is and how it can cover many aspects of a business. Functional areas such as Sales, Customer Service, Marketing, Reporting were leveraged, and then standard platform capabilities were used to build custom modules such as Membership Management and Billing.

We have now moved RMI from a restricted On-Premise setup to a flexible cloud setup, enabling them to gain insights into their data and leverage standard integrations such as Office 365 and Resco mobile.”

JAMIE EVANS - TECHNICAL DIRECTOR AT PRAGMATIQ

## PHASE 2



After Phase 1, RMI approached Pragmatiq about a Phase 2, to enhance the system further. Doing it in two phases meant the organisation could roll out the initial system to be adopted across certain departments and see the value, before bringing in other areas. The task was to now build on top of the system, bring in other areas of the business such as RMISC (Retail Motor Industry Standards and Certifications) and Trust my Garage.

### RMISC

RMISC is the commercial arm of the organisation, that provides training resources, packages and courses to members.

The main aim of this second phase was to streamline the administration processes around RMISC sales and invoicing and provide a single source of truth of member activities across the board.

We built functionality that meant whenever an order was placed for a training resource, or a course was booked, this could be processed through Dynamics 365. Orders are logged against a member, so users have visibility of previous history and what training they are currently undertaking.

Invoice templates were also created, allowing users to quickly generate and invoice off the back of an order, and add it to the system. Previously, this process was completed in a different system, meaning there was a disconnect between Dynamics 365 and the invoice process, and manual administration time was required.

Non-members also have the ability to place orders. This new system enables a user to determine whether there is interest in membership, and if so, can add a lead directly within Dynamics 365 for the sales team to follow up.

### BENEFITS:

- > **Less time spent on administration** - As automation now supports this process, staff are able to focus on other areas as they are spending less time on manual administration
- > **Single source of truth** - All activities are tracked against membership plans, providing a 360-degree overview of a member
- > **Increased sales opportunities** - Non-member sales can be auto-generated as RMI member prospects based on level of interest

### TRUST MY GARAGE

Trust my Garage is a collection of garages that are members of the Independent Garage Association, which is part of RMI. They must comply with a strict code of practice and get regularly audited to ensure the highest standards of service. The Trust my Garage area of the business previously used a siloed database (QuickBase) and the aim was to bring the process into Dynamics 365.

QuickBase was clunky and difficult to use, lacked customisation which made capturing information a challenge, and has no integration with Dynamics 365, meaning a lot of member was duplicated across the solutions.

To overcome this, Pragmatiq extended the solution that was built in Phase 1, to capture the data required for Trust my Garage. As part of the audit process, people are sent out to review the garages, however scheduling these audits previously was a manual task. Within Dynamics 365, this functionality is reflected in the system, allowing audits to be easily scheduled. Audit notes are also tracked and when an audit is marked as complete, the system schedules the next one in the future so that this information is not relying on memory/manual reminders.

As mentioned in Phase 1, Resco was implemented to support the sales process. The main part of the Trust my Garage audit is completed with the Resco application, so this application was extended to include audit forms. Auditors can take their tablet on site, fill out all the questions on the Resco app, including any pictures or signatures that are required. This data syncs with Dynamics 365 and if there are low scores on any area of the audit, background automation automatically creates a recommendation report that can be used in a future audit.

### BENEFITS:

- > **Centralised solution** - Having all the information with Dynamics 365 made managing the audits a simpler and clearer process for the admin team
- > **Better on-site experience** - Due to the Resco application, auditors can work from one mobile application when completing on-site audits. This simplifies the process, reduces duplication and provides a better experience overall

### CAN WE HELP YOUR ORGANISATION?

Pragmatiq are a Microsoft Partner, specialising in building bespoke technology solutions that solve real problems and make a difference.

If you want to learn more, please get in touch...

- > **Email** - [info@pragmatiq.co.uk](mailto:info@pragmatiq.co.uk)
- > **Phone** - 01908 038110
- > **Website** - [www.pragmatiq.co.uk](http://www.pragmatiq.co.uk)