

COMPANY CASE STUDY

# BUCKINGHAMSHIRE BUSINESS FIRST



## COMPANY BACKGROUND

Buckinghamshire Business First (BBF) is an organisation which supports new, established and growing businesses across Buckinghamshire. Their aim is to provide their members with knowledge, support and opportunities for growth. Offering membership options, businesses are able to gain knowledge, make connections, and use the business facilities, products and services that BBF offer.

BBF have previously implemented Microsoft Dynamics 365 and as their business develops, have required the system to adapt to support these needs. The nature of Dynamics 365 means that as business requirements change, the system can be customised to suit new processes.



### POWER BI

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- BBF faced challenges around their reporting process, spending hours each month extracting data and creating manual charts and graphs.
- We implemented Power BI, transforming the previous time-consuming reporting process.



### CUSTOMER VOICE

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- BBF wanted to send a survey to their clients, sense checking how COVID-19 has affected businesses and their transitions back to the workplace.
- Had various requirements about the way the surveys were sent and analysed, so we identified that Dynamics 365 Customer Voice would meet these needs.



### COVID-19 GRANTS

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- As an organisation which supports businesses, BBF received grants to be allocated, to support with the impact of COVID-19.
- The response to these grants was significant and BBF required additional functionality within the system to manage these new enquiries.

## POWER BI

BBF previously faced challenges around their manual reporting process. At the end of each month, hours would be spent extracting the data from Dynamics 365 into spreadsheets, transforming the data, and creating manual charts and graphs. The aim of this process was to gain a better insight into the business and how they are operating. However, this cumbersome approach took a day and a half each month, and only produced limited insights. Along with this, human error was an issue and as a result would be complex to implement this process in other areas of the business where further insights are required.

We implemented Power BI, transforming the previous time-consuming reporting process. This tool provides BBF with a platform to gain insights, automatically completing the process of gathering data and generating the right level of visuals through Dashboards and Reports.

As a result, the following benefits were realised:

- › **Time saved on manual admin** – The reporting process previously took a day and a half each month. Throughout the implementation of Power BI, this process is now completed automatically, producing up-to-date and accurate reports daily. BBF can now gain insights into their data whenever they wish, in a timely manner.
- › **Insight into the whole of the business** – BBF recognised the capabilities of Power BI and other areas of the business they could gain insights into, such as grants analysis, referrals and outcomes. We implemented Power BI and expanded the capabilities to also report on these areas, enabling the organisation to gain enhanced insights across more of the business. BBF now have the data to make better, more informed decisions, in some of the key areas of operations.
- › **Deeper insight into data** – The reports generated through Power BI are much more detailed and in-depth than the manual reports previously created. This allows BBF to gain a more detailed insight into the business and identify areas for improvement and those which are working well; quickly and easily.
- › **Can easily extend Power BI** – Previously, BBF faced limitations of areas within the organisation they could report on. Power BI can be easily extended across the whole business, supporting them in their growth





## CUSTOMER VOICE

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The organisation are currently using ClickDimensions, which has surveying capabilities, but the experience of building a survey is complex and the data would be challenging to report on. Survey Monkey was also experimented with and considered, however, the disconnection between this tool and Dynamics 365 meant that a lot of manual work would be required to link the survey responses. We identified that Dynamics 365 Customer Voice would meet their requirements, because of the logic you can implement around the questions, the automated was in which responses can be manipulated and the enhanced insights you can gain. Additionally, Customer Voice and Dynamics 365 integrate, meaning all survey invites and responses get pulled back into the system automatically.

One of BBF's requirements was to send the survey via their newsletter but also required the option to send the link directly. However, they needed the system to recognise if the person answering the survey was already stored within Dynamics 365. To solve this, we built a Power Automate Flow to recognise if someone in their database was answering and match their details to an existing record within the system. By creating an automatic workflow, this avoids duplication of data and ensures the response is stored against the correct record.

As a result of leveraging Dynamics 365 Customer Voice, the following benefits were realised:

- **Integration with Dynamics 365** – Survey invitations and responses track in Dynamics 365. If the system recognises that the respondent is already stored in BBF's CRM, the flow that we have built will save the response to that record automatically.
- **Gain instant insights** – BBF were able to reach a significant number of businesses in a timely manner and gather feedback quickly. Not only are they able to have visibility of the standard responses, but Customer Voice provides enhanced insight into feedback such as trends, sentiment, etc.
- **Reduce admin around survey management** – With the extra capabilities to automate sending surveys and analysing responses, time was saved which would usually be spent manually administering surveys.

“Pragmatiq are a trusted and dynamic CRM partner. They have provided quick, flexible and innovative solutions to the challenges we've given them whilst being professional and supportive. They have become a reliable partner and operate as an extension of our internal team.”

SARAH RANDALL - HEAD OF OPERATIONS AND MI SYSTEMS AT BUCKINGHAMSHIRE BUSINESS FIRST

## COVID-19 GRANTS

As an organisation which supports businesses, BBF received grants to be allocated, to support with the impact of COVID-19. Understandably, the response to these grants was significant and BBF quickly became inundated with applications from local businesses seeking support. Their system was able to handle the level of enquiries. However, given the nature of this new application, additional customisations of the system were required to help manage more specific elements. One of the benefits of Dynamics 365, is the ability to build on top of the platform as business requirements change, without the need to implement a whole new solution; this enabled BBF to respond quickly to the demands of businesses, in this challenging time.

We understood the urgent turnaround time of this request and quickly gathered the new requirements. We then built these entities into their Dynamics 365 system, allowing BBF to capture and track the additional information required for the grants.

Along with this, we built a dashboard which visually demonstrated the amount of money left to be allocated vs what had already been spent. This provided the organisation with a quick view of the grants and where they were being allocated, without the need to gather a vast amount of data, or scroll through various reports.

By responding quickly to this request and having an adaptable system, BBF were able to remain efficient throughout. The organisation was able to continue to work in their usual manner, without having to overhaul current processes and implement a new system to manage these new enquiries.



**“Working with Dynamics 365, the Power Platform and the rest of the Microsoft eco-system, has enabled us to continuously add value to BBF and their business applications setup, by implementing additional stable and fit for purpose solutions when the requirements arise.”**

JAMIE EVANS - TECHNICAL DIRECTOR AT PRAGMATIQ

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