

PRAGMATIQ

COMPANY CASE STUDY

FFE



COMPANY BACKGROUND

FFE is a UK based global design and manufacturing business, dedicated to supplying specialist detection products to the fire industry.

Previously using an off-the-shelf CRM system, FFE engaged with Pragmatiq to design, develop and implement a bespoke solution built on the Dynamics 365 platform.



CHALLENGES

- › Previously using an off-the-shelf CRM system
- › Significant manual work created for sales representatives due to limited functionality in system
- › Required bespoke functionality that fit their processes, but the previous system was restrictive
- › Previous system was largely disconnected from other applications within FFE's landscapes
- › Reporting was also heavily impacted due to the disconnected applications and lack of visibility
- › Limited marketing capabilities



SOLUTION

- › Implemented Dynamics 365 Sales and configured this to fit around the sales representatives' day-to-day processes
- › Set up default pricelists for FFE's customer to give them more control around pricing
- › Implemented Microsoft Approval Flows
- › Standard document generation functionality was implemented to automatically create quotes and orders
- › Implemented Microsoft Dynamics 365 Marketing
- › Established an integration between Dynamics 365 and Microsoft 365



BENEFITS

- › Controlled and systemised processes across the business
- › Improve overall Operational & Process Efficiency
- › Reduced admin time
- › Improved forecasting accuracy and visibility
- › Enhanced collaboration
- › Improved marketing capabilities

CHALLENGES



FFE were previously using an off-the-shelf CRM system mainly for tracking opportunities and quoting, however, this was no longer fit-for-purpose and challenges arose around user adoption as a result.

Due to limited functionality around quoting capabilities within the previous system, additional manual work was created for sales representatives and users found themselves working outside of the system. This significantly increased admin time, as controlling the approval process, various pricelists and generating quotes was all manual and not linked within the CRM system. FFE also required functionality which allowed multiple opportunities to link to a single project, however, the limitations within the previous system were restrictive. As a result, managers lacked an accurate view for pipeline figures and forecasting.

The previous system was largely disconnected from other applications in FFE's landscape, meaning that internal departments were siloed, and data visibility was also impacted. Gaining a full view of the customer was a challenge, which had a knock-on effect on the ability for sales representatives to do their job effectively.

Reporting was also heavily impacted due to the disconnected applications and lack of visibility, so was not being leveraged to its full potential. Any reporting which was undertaken was manual, admin-heavy and could be improved with a more efficient set-up.

From a marketing perspective, the limited capabilities within the previous CRM presented various challenges. As a result, this was not used and FFE recognised the benefits of a proper marketing application to properly segment customers and perform targeted campaigns.



SOLUTION



We implemented Dynamics 365 Sales and configured this to fit around the sales representatives' day-to-day processes. This included functionality to accommodate sales activity, quotes, orders, opportunity management and other key areas. It was also important that within the system, opportunities could be linked to projects to increase efficiency further in the sales process.

One of the key elements of the system was the ability to effectively manage multiple pricelist bandings and currencies. To overcome this, we set up default pricelists for each customer within D365 Sales which gave FFE a better controlled and standardised pricing set-up.

In addition to this, we implemented Microsoft Approval Flows to support the approval process. Previously, there was little control around the sales representatives' providing discounts and giving away free of charge items, and the control that was in place was reliant on a manual process. Microsoft Approval Flows now provides an automated, systemised approach which prevents discounts being applied without management approval.

We also recognised that a large amount of employee time was being spent manually generating quote and order documentation. To overcome this, standard document generation functionality was implemented to automatically create quotes and orders, which could then be sent directly to customers. The templates created can autofill information directly for the customer, quote and order records, meaning that no manual work is now required around this process.

To support the marketing activities, we implemented Microsoft Dynamics 365 Marketing, enabling FFE to perform email campaigns, manage social posting, embed forms on their website, personalise the customer journey and complete other marketing tasks.

Lastly, we established an integration between Dynamics 365 and Microsoft 365 (previously known as Office 365); Word, OneNote, Excel, SharePoint, Teams and Outlook. As a result, users could collaborate on documents in real-time and increase overall efficiency.

BENEFITS



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

- > **Controlled and systemised processes across the business** – By implementing Dynamics 365 Sales and functionality such as Microsoft Approval Flows and document generation, there is more control around the business processes and a systemised approach across the business.
- > **Improved overall operational & process efficiency** – Within FFE, there is no longer the need to switch between disparate applications or work outside of the system. Additionally, the system now accurately reflects the way sales representatives conduct their roles, meaning that overall operation and process efficiency is improved.
- > **Reduced admin time** – By implementing a fit-for-purpose CRM solution, FFE now saves a considerable amount of time searching for customer information and completing manual, time-consuming processes across the business. Additionally, the introduction of document generation functionality saves time manually generating and sending quotes and orders to customers.
- > **Improved forecasting accuracy and visibility** – Data is now stored in a centralised, cloud-based CRM system which is accessible to all departments. This ensures that information is up-to-date and easy to access, whilst being reflective of FFE's current processes. As a result, this is easier to report on and therefore improves forecasting accuracy and strategic decision-making.
- > **Enhanced collaboration** – Across FFE, employee collaboration is enhanced due to the integration with the Microsoft productivity stack, such as Word, OneNote, Excel, SharePoint, Teams and Outlook. Employees can access these tools wherever they are, supporting the potential to work remotely and be confident that the data they are working with is the latest version, as a result of real-time capabilities.
- > **Improved marketing capabilities** – Dynamics 365 Marketing now provides functionality in this area and the opportunity to increase sales as a result of marketing activities. As this is integrated with the CRM system, data is automatically segmented, and can be used to send targeted campaigns to current customers and prospects.



“Pragmatiq helped us implement Microsoft Dynamics as a CRM system. The team have risen to every challenge in the design, implementation and onboarding process, including helping us define further customisations and integrating the platform with other third-party market data software that we use.

The strengths of Pragmatiq lie in their team who take time and care to help you define your needs before using their considerable technical expertise to create workable solutions that add business value. I would recommend Pragmatiq as a partner to anyone considering Microsoft Dynamics for their business.”

PRANAV SHARMAN - SALES DIRECTOR AT FFE

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
- > **Phone** - 01908 038110
- > **Website** - www.pragmatiq.co.uk