PRAGMATIQ

FOTECH

Fotech
solutions

COMPANY BACKGROUND

Fotech provide cutting-edge fibre optic sensing solutions across sectors such as security, smart cities, intelligent transport and energy, to simplify how assets are monitored and managed. Previously using Salesforce, Fotech engaged with Pragmatiq to implement a fit-for-purpose solution built on Microsoft Dynamics 365.

CHALLENGES

› Previously using Salesforce as their CRM, however, this no longer supported their current business processes

› Disconnect between Salesforce and their ERP system, meaning that manual workarounds were implemented

› Document generation was a laborious task which could be improved

› Reporting and business forecasting was impacted due to disconnected systems

› Restricted when it came to marketing potential

SOLUTION

› Implemented Microsoft Dynamics 365 Sales

› Customised the system to fit around their Lead & Opportunity management process

› Developed document generation functionality

› Established integration between Dynamics 365 and Microsoft 365

› Implemented Dynamics 365 Marketing

› Implemented Power BI

BENEFITS

› Time saved

› Increased user adoption

› Increased insight for decision making – Data is now refreshed in real-time and includes figures from both

› Dynamics 365 Sales and Business Central

› Enhanced collaboration across the business – supporting employees working remotely

› Improved marketing capabilities

CHALLENGES

Fotech were previously using Salesforce as their CRM, however, due to lack of functionality and flexibility within the system it no longer supported the way they worked as a business. This restrictiveness resulted in a poor user experience and meant employees worked outside of the system, in local spreadsheets and disconnected systems. Due to the lack of connection between systems, hours were lost to duplication of work and time spent switching between multiple applications to access information.

Additionally, Salesforce did not accurately reflect the sales teams' processes and did not offer the adequate support in their day-to-day roles. When managing Leads & Opportunities, limitations within the system meant that unnecessary manual work was generated and was an inefficient use of employee time. On top of this, document generation was a laborious task which could be improved.

Another one of the main challenges for Fotech, was the disconnect between Salesforce and their ERP System. To bridge this gap, spreadsheets were being used to manage Quotes & Orders, but this increased the workload around data input and transferring this knowledge into the correct system. Also, due to this disconnect, it was difficult for managers to forecast effectively from a production perspective as data was in various places.

Reporting was heavily impacted due to the disconnected applications and became a manual, admin-heavy task each month. Management would spend hours each month gathering information to gain limited insights into the business.

Fotech also recognised the importance of marketing and the impact this could have with the right system in place. However, siloed data and lack of insights from Salesforce made marketing activities a challenge.

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SOLUTION

As part of Fotech's CRM Project, the business was also embarking on a Dynamics 365 Business Central (ERP) implementation. Therefore, when choosing a CRM, it was crucial that there was a seamless integration with the ERP set-up. For this reason, Microsoft Dynamics 365 Sales was established to be the best fit.
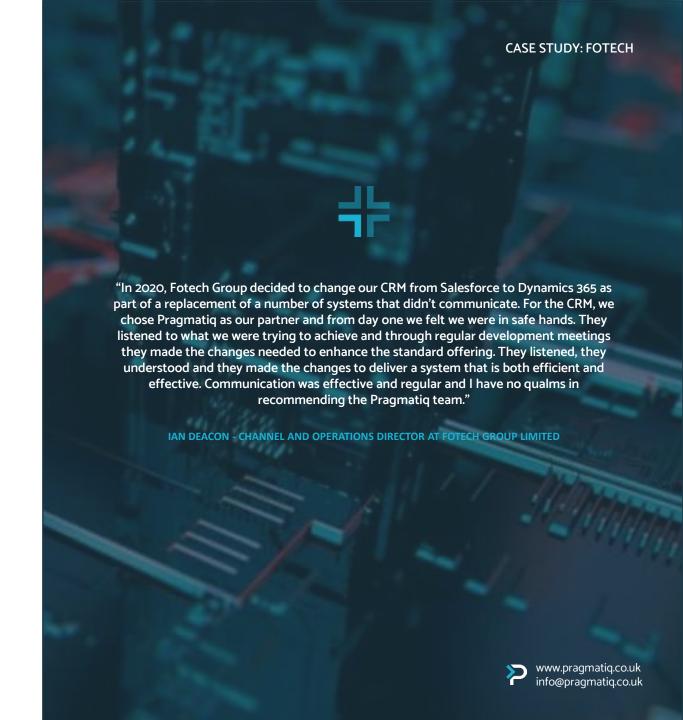
We implemented Dynamics 365 Sales and customised the system to fit around their individual Lead & Opportunity management process. This included functionality to accommodate sales activity, stakeholder management, opportunity management, evaluations and other key areas. It was also important that within the system, opportunities could be linked to projects to increase efficiency further in the sales process.

Fotech's complex pricing model met challenges in Salesforce and was one of the factors that led to users working outside of the system. Within the Dynamics 365 implementation, functionality to handle this element was built-in and meant that product selection and pricing could be managed effectively, without having to leave the system.

We also recognised that a large amount of employee time was being spent manually generating quote and order documentation. To overcome this, document generation functionality was developed to automatically create quotes and orders, which could then be sent directly to stakeholders.

Across departments, collaboration was often required, however, disconnected applications and spreadsheets made this increasingly difficult. 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. To achieve the marketing goals, we implemented Microsoft Dynamics 365 Marketing, enabling Fotech to perform email campaigns, manage social posting, embed forms on their website and complete other marketing tasks.

Finally, we implemented Microsoft Power BI, enabling management to view key information across Dynamics 365 Sales and Business Central in one platform. Due to data residing in different applications previously, gaining a 360-degree overview was a challenge. Establishing this robust business intelligence set-up means data is refreshed in real-time and management can quickly gain insights into sales actives, revenue, production capacity and other KPI's.

"In 2020, Fotech Group decided to change our CRM from Salesforce to Dynamics 365 as part of a replacement of a number of systems that didn't communicate. For the CRM, we chose Pragmatiq as our partner and from day one we felt we were in safe hands. They listened to what we were trying to achieve and through regular development meetings they made the changes needed to enhance the standard offering. They listened, they understood and they made the changes to deliver a system that is both efficient and effective. Communication was effective and regular and I have no qualms in recommending the Pragmatiq team."

IAN DEACON - CHANNEL AND OPERATIONS DIRECTOR AT FOTECH GROUP LIMITED
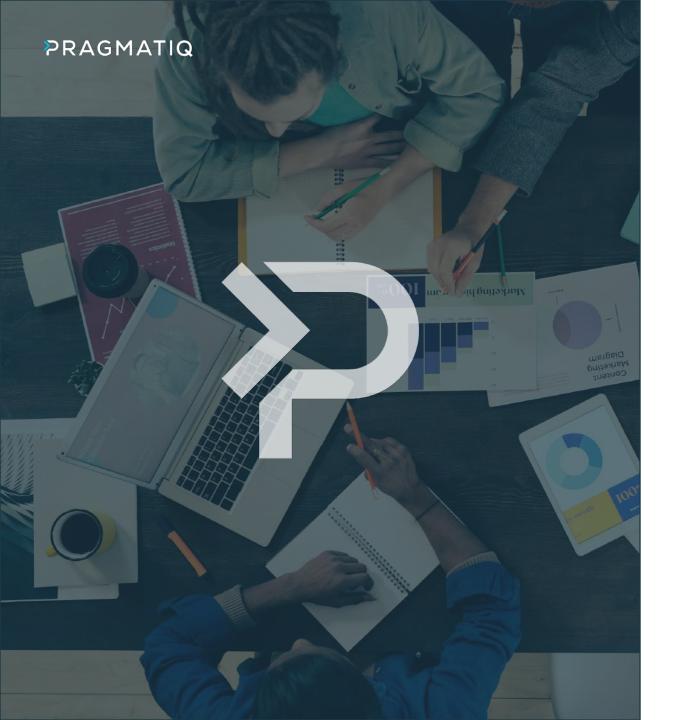
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BENEFITS

> **Time saved** – By implementing a fit-for-purpose CRM solution which is integrated with the ERP system, Fotech now saves a considerable amount of time switching between various applications and searching for information. Additionally, the introduction of document generation functionality saves time manually generating and sending documentation tom stakeholders.

> **Increased user adoption** – Dynamics 365 Sales accurately reflects employees' daily tasks and the way business is conducted, alongside providing access to the tools required from one, connected system. As the solution is built using Microsoft functionality, the tool is more familiar to users, helping to increase user adoption.

> **Increased insight for decision-making** – Previously, Fotech were spending 1 day each month manually generating reports. This involved a laborious process of collating data from various systems and spreadsheets, in order to gain limited insights. With Power BI, data is now refreshed in real-time and key figures from Dynamics 365 and Business Central can be interrogated on a daily basis. This will allow managers to make informed decisions around material requirements planning production capacity, sales and other areas.

> **Enhanced collaboration** – Across Fotech, 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** – Previously, Fotech did not have software in place to support marketing efforts. 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 customer information will flow between the applications. For example, Fotech can embed forms on their website and when filled out, will automatically pass the information securely into Dynamics 365 and create, or update the record where necessary.

"Fotech has chosen to use Dynamics 365 across their front-end (CRM) and back-end (ERP) systems to ensure an accurate and connected flow of data between them. In relation to the CRM, the Sales teams now have a fit-for-purpose solution that is modelled to the way in which they sell their products and services, and accommodates for the more complex elements such as product pricing, opportunity scoring and project-related opportunities."

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ

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