

COMPANY CASE STUDY

# GEORGE DAVIES TURF



## COMPANY BACKGROUND

George Davies Turf is a leading independent turf supplier. Established in 2001, the company has continued to expand and supplies turf to a growing number of golf courses, leading housing developers, landscaping contractors and a huge number of residential gardens.



### CHALLENGES

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- › The previous system no longer reflected the way business was conducted
- › Required a new solution to manage sales, planning & delivery of orders and accounts
- › In the previous system, speed to access key information and record new orders was time-consuming
- › Planning & delivery previously managed manually
- › Lack of insights and analysis
- › Limited integration between departments
- › Limited marketing capabilities



### SOLUTION

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- › Implemented latest version of Dynamics 365, including Unified Interface and on-board all departments
- › Designed and implemented standard 'quote, order and product catalogue' functionality
- › Re-architected the sales process from start to finish
- › Implemented custom-built functionality for planning & delivery
- › Established Twilio SMS integration with Dynamics 365
- › Implemented Power BI
- › Implemented Dynamics 365 Marketing



### BENEFITS

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- › 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



Prior to engaging with Pragmatiq, George Davies Turf used a system to track the sales side of the business. However, they recognised that the functionality within this system no longer reflected the way business is conducted and required a new solution to manage sales, planning & delivery of orders & accounts.

As George Davies Turf continues to expand, the clunky nature of the previous system was not enough to support the teams, making access to key information and the speed at which quotes & orders were created, a challenge. Data lacked separation and appeared all on one screen, so searching for the relevant information took longer than necessary and slowed processes down. As many orders are taken on the phone, it is essential that data can be found quickly and can be input into the system in a short time frame, which was not possible due to the impractical functionality within the old system.

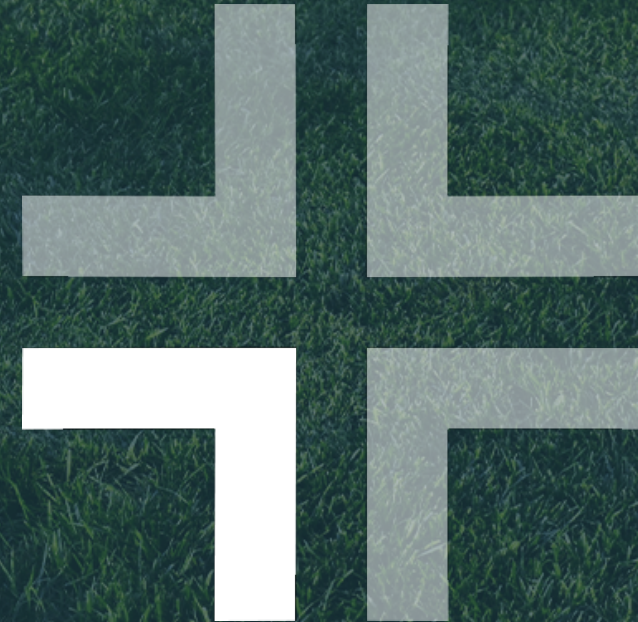
On top of this, most of the planning & delivery side of the business was managed manually, with records and notes being kept on paper. As a result, there was room for error and miscommunication, as well as being more time-consuming than systemised processes. Challenges also arose when information needed to be accessed quickly. As the information was not within a system, it needed to be manually searched for and slowed down other processes.

Another concern for George Davies Turf was the lack of insights and analysis around this side of the business. Many of the processes were paper-based, reporting became cumbersome and the limits of what could be reported on within the system had been reached. However, George Davies Turf recognised the importance of this to improve efficiency and decision making; this was one of the key outcomes for the new solution.

Finally, there was little integration between departments; accounts, planning & delivery, and sales. Due to many processes being completed manually, teams lacked visibility of other workloads which resulted in a disjointed approach and a huge amount of manual communication. For business continuity, this was also a concern, as lack of systemised processes meant knowledge was contained to that department and would be a challenge if certain individuals were off or left the business.

Alongside solving the above challenges, other key goals to be achieved are outlined below:

- **Improve overall operational & process efficiency**
- **Better support for management decision-making**
- **Improve employee productivity**





## SOLUTION



To achieve the main goals for George Davies Turf we proposed an implementation of the latest version of Microsoft Dynamics 365, leveraging the Unified Interface, which also achieved additional speed improvements and a better user experience. Within the system we designed and implemented standard 'quote, order and product catalogue' functionality, which enabled quotes and orders to be generated quickly and efficiently, improving the time taken when on the phone to a customer. By introducing these additional entities, information within the system was segmented and easier to find, which was previously a challenge, as there was little separation of data.

We also re-architected the sales process and streamlined the stages from start to finish, aligning this with the way George Davies Turf conducts business. This ensured that the system is used to support sales, as opposed to hindering it and slowing employees down.

To improve operational efficiency and the flow between departments, multiple processes were automated and a reliance on manual processes was reduced. To assist with this goal, all departments were on-boarded onto Dynamics 365, whereas previously only the sales team leveraged the system. This eliminated both the need for manual communication and time spent searching for data, as well as the reliance on employee knowledge, as processes were now standardised within the system.

For planning & delivery, custom-built functionality was implemented which allowed George Davies Turf to gain a full overview of this process, track incoming and outgoing loads, deliveries and high-level stock calculations. It was essential that the solution we built to manage this area was easy to use, whilst also being informative and displaying the required information. Previously this process was managed mainly on paper and involved manual communication between departments.

Using PCF's (Power Apps Component Framework), we essentially built a user experience interface over a complex planning and delivery solution. This allowed users to interact with their data in a way that makes sense to them. Drag & drop functionality allows users to easily allocate deliveries, manage incoming turf, see if the allocated turf is over the lorries weight capacity, view how much turf is coming in versus what's been sold, transfer turf between branches, etc.

Twilio SMS integration with Dynamics 365 was also established, to enable George Davies turf to easily and quickly communicate with their customers, when an order is due to be delivered.

Power BI was implemented during the project, transforming the previous cumbersome and time-consuming reporting process. As the previous system did not contain all of the information across departments, the data could not be truly reported on and give an accurate representation of the operations of the business. We created dashboards giving visibility into sales, planning & deliveries, suppliers, etc. As a result, managers would gain increased insight into data, allowing them to make more informed strategic decisions.



## BENEFITS



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

- **Improved overall operational efficiency** - By implementing Dynamics 365, George Davies Turf now have all data stored on one system. This has increased visibility across departments, streamlined operational efficiency and has reduced the need for manual processes.
- **Increased employee productivity** - Restructuring the system to reflect their processes means employees no longer have to input information which is not relevant to their sale, just to get through to the next stage of the system. As a result, productivity has been increased and the time taken to complete a sale, particularly on the phone, has been reduced. Additionally, planning & delivery have full visibility of processes within the system and can manage deliveries and orders more effectively.
- **Time saved on day-to-day activities** - Implementing functionality giving the ability to generate and send documents within the system such as quotes and invoices, send SMS messages to inform customers and automatically calculate prices and margins, supports employees in their day-to-day activities and saves time as a result.
- **Improved insight for decision-making** - We implemented Microsoft Power BI to enhance reporting capabilities, a time-consuming process which was previously completed manually, based only on limited data within the system. George Davies Turf can now report on their data from one central application, which will lead to hours of time saved on administration compiling the reports, immediate access to live and accurate data and therefore will vastly improve decision-making abilities.
- **Connected Departments** - Previously, it was only the Sales team who used the system for their core activities. As a result, departments were disconnected and relied heavily on manual communication to ensure orders are accurate and delivered on time. By onboarding the planning & delivery team and the accounts department, the flow of information internally has been enhanced, is more accurate and ensures that everyone is accessing the same information.
- **Business continuity** - Due to the nuances across the business, particularly around the way planning and deliveries were previously managed, knowledge relied on individuals within the business. The new solution means these processes are now systemised, knowledge can be easily transferred, and new people can be trained easily



“We had searched for a way to increase the capacity of our planning and logistics operation for years. After previous attempts by other companies, and after assessing the options on the market, I turned to Pragmatiq. Having been disappointed (by another company) in the past, I was sceptical as to whether they would be able to help, however, we knew their work, having engaged their services for the implementation of a CRM system dovetailed with a Power BI dashboard through Microsoft Dynamics.

Pragmatiq initially proposed a proof of concept, that gave us confidence that they understood what we were trying to achieve. Through a carefully structured program, we collectively planned and brainstormed to design what we believed would be the answer to our problems.

The design and build process was very well planned, with carefully scheduled meetings, and demonstrations of what had been achieved. We felt informed and confident throughout the process. When we encountered obstacles both parties worked together and James and Aqib always delivered a solution. Delivery was as scheduled and on time, we were offered support and problem resolution on implementation of the system.

The system has provided us with a solution, and created greater capacity within the business, along with essential reporting tools, that are key to determining the direction of the business. I have found Pragmatiq to be professional, innovative, focused and aligned to our requirements, for this I thank them for a job very well done.”

GEORGE DAVIES - COMPANY DIRECTOR AT GEORGE DAVIES TURF LTD

## ADDITIONAL MARKETING PHASE



### CHALLENGE:

After the initial implementation of Dynamics 365, George Davies Turf approached Pragmatiq about another phase to support marketing functions across the business.

Previously, George Davies was using a siloed marketing automation solution to support their marketing activities, although activity in this area was relatively low. Performing basic email marketing or managing social media was time-consuming, and the lack of integration with the CRM system meant that gathering contact information and segmenting data was a manual approach.

The business anticipated an increase in marketing activities in the near future and required a more advanced system to support its plans.

### SOLUTION:

To support George Davies Turf, Pragmatiq implemented Microsoft Dynamics 365 Marketing. Initially, this implementation focused largely on email marketing and customer journeys, with the possibility for George Davies to adopt functionality around events/social media in the future.

Due to the native integration with the CRM system, customer information is automatically pulled through to marketing and allowing George Davies to segment this data in the best way, and then create relevant customer journeys. Capabilities within the system allow George Davies to be clever with their marketing activities, for example; send an email with an offer if someone has not placed an order in 3 months, or if a customer purchases turf without anything else, send an email with an upsell offer.

On top of this, the Twilio integration was leveraged to enable George Davies Turf to send SMS messages as part of marketing campaigns. This increases the opportunities for the business and provides more possible touchpoints with customers.

To ensure George Davies can get the most out of the solution, Pragmatiq provided detailed training around the key elements of the marketing application. For email marketing, several initial email templates were set up, then employees were trained on how to create these for other scenarios they require in future.

### BENEFITS:

- > **Improved accuracy of customer information** – Given that the focus of this solution is to effectively market to customers/prospects, having the right information is essential. As part of this implementation, George Davies Turf built a customer journey that sent a form to all contacts in the system, requiring them to update their details. Once this form was completed, the data automatically updated in the CRM. This is not only beneficial from a marketing perspective, but also across the wider business.
- > **Enhanced marketing capabilities** – Dynamics 365 Marketing provides George Davies Turf with more advanced marketing capabilities than they had before. There is also scope to adopt more functionality in future depending on their needs, such as event or social media management.







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