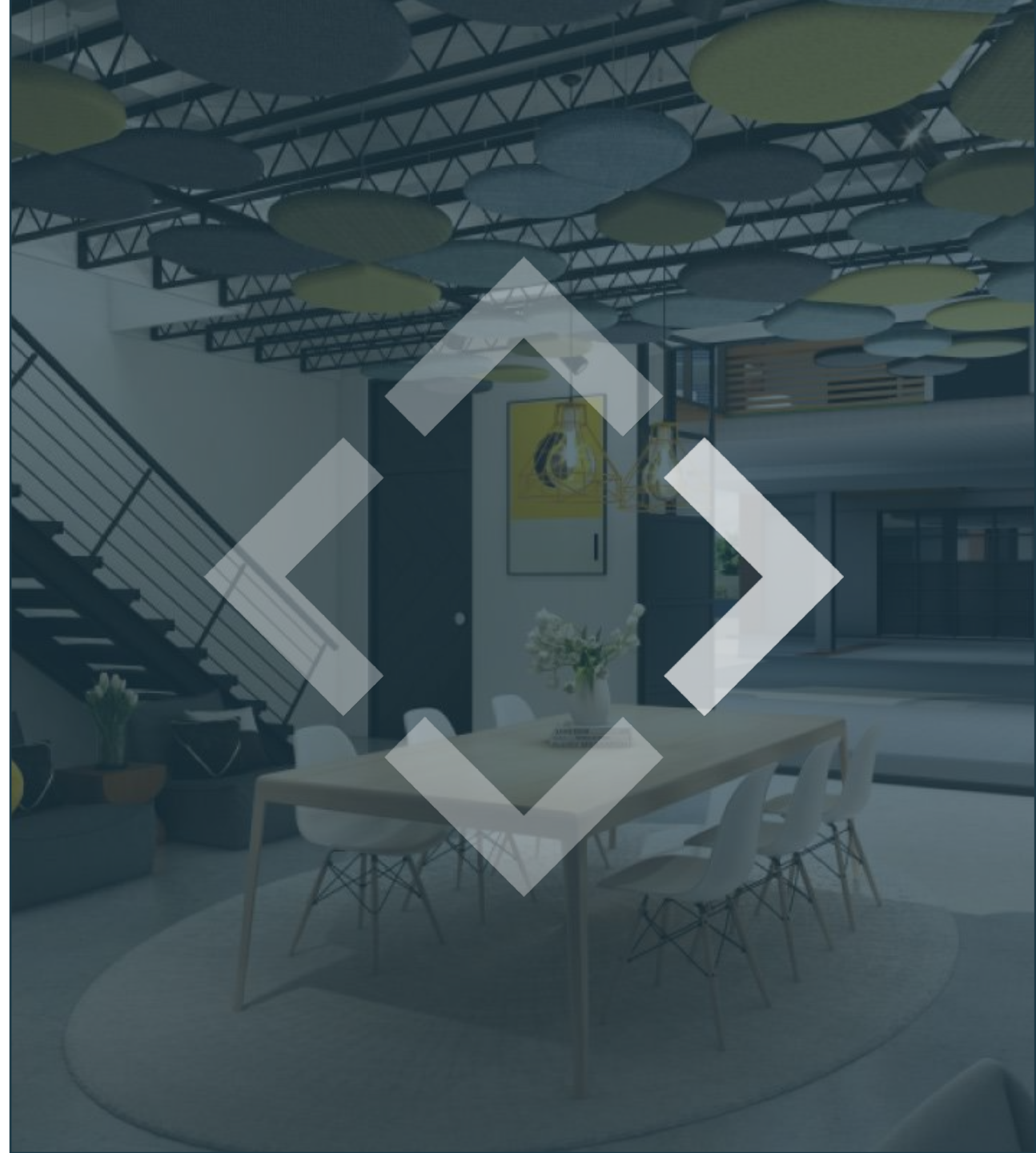


PRAGMATIQ

COMPANY CASE STUDY

# IOTA OFFICE FURNITURE

**IOTA**  
OFFICE FURNITURE



## COMPANY BACKGROUND

IOTA Office Furniture specialises in creating engaging, flexible and productive working environments. They work closely with businesses to deliver an end-to-end design and furniture solution that fits organisational requirements, embraces new technology and provides a space that has a positive impact.

The business required a fit-for-purpose CRM System to support day-to-day operations, and engaged with Pragmatiq to explore Microsoft Dynamics 365.



### CHALLENGES

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- › Previously used Xero as their CRM system
- › Limitations around business development, prospect management, and quoting & product management
- › Lacked visibility of their business information
- › Also managed information within various spreadsheets and Outlook
- › Previous quote management process was time-consuming and cumbersome
- › Lacked reporting functionality and the ability to drill-down into customer history
- › Heavily reliant on employee knowledge and expertise



### SOLUTION

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- › Implemented Microsoft Dynamics 365 Sales
- › Developed functionality to provide structure and increase visibility around day-to-day information
- › Integration with Xero was established to support financial processes
- › Automated the flow of data throughout the entire process, from Lead to Invoice
- › Provided a structured quote management process
- › Implemented a custom drawing tracking feature to support design team
- › Established integrations with Outlook and SharePoint
- › Reporting functionality within D365 to create reports and dashboards



### BENEFITS

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- › Improved visibility and access to information
- › Streamlined quote management process
- › Enhanced reporting and insights
- › A stable platform for future growth



## CHALLENGES



iOTA previously used Xero as their CRM system, as this solution was used for other processes across the business. However, Xero is not designed to be used as a CRM system and therefore presented limitations around business development, prospect management, and quoting & product management. Due to this, iOTA lacked visibility of their business information and were prevented from properly managing their deals end-to-end, from within a centralised solution.

In addition to Xero, iOTA managed information within various spreadsheets and Outlook; this was difficult for individuals to find the data they needed quickly on a daily basis.

During the initial stages of working with Pragmatiq, iOTA highlighted that the previous quote management process was time-consuming and cumbersome. Individuals used a combination of spreadsheets and Xero to search for the information, then manually generate and send quotes. The exact products required for a client quote are also not always known in advance, therefore when this data was later known at the order stage, the data had to be re-entered. This was a duplication of effort on a regular basis and provided an opportunity for automation to be introduced, alongside a structured, systemised quoting process.

From a reporting perspective, Xero had limited functionality and lacked the ability for iOTA to drill-down into customer history, alongside other areas. This made it difficult for managers to truly understand areas that need extra focus and improvement, as well as areas that are performing well.

Lastly, from a business continuity perspective, the lack of a fit-for-purpose CRM solution presented challenges, as iOTA was heavily reliant on employee knowledge and expertise. As the business continues to grow, this approach would become unmanageable and restrictive.



SOLUTION



To overcome the above challenges, Pragmatiq implemented Microsoft Dynamics 365 Sales. This solution would support the current requirements of the business, but also provide functionality around Business Development Management, that iOTA planned to focus on in future.

To provide structure and increase visibility around day-to-day information, standard functionality is implemented within the system, such as Leads, Opportunities, Accounts and Contacts. This ensures the relevant customer data is stored in the right place and staff can easily access the information they need.

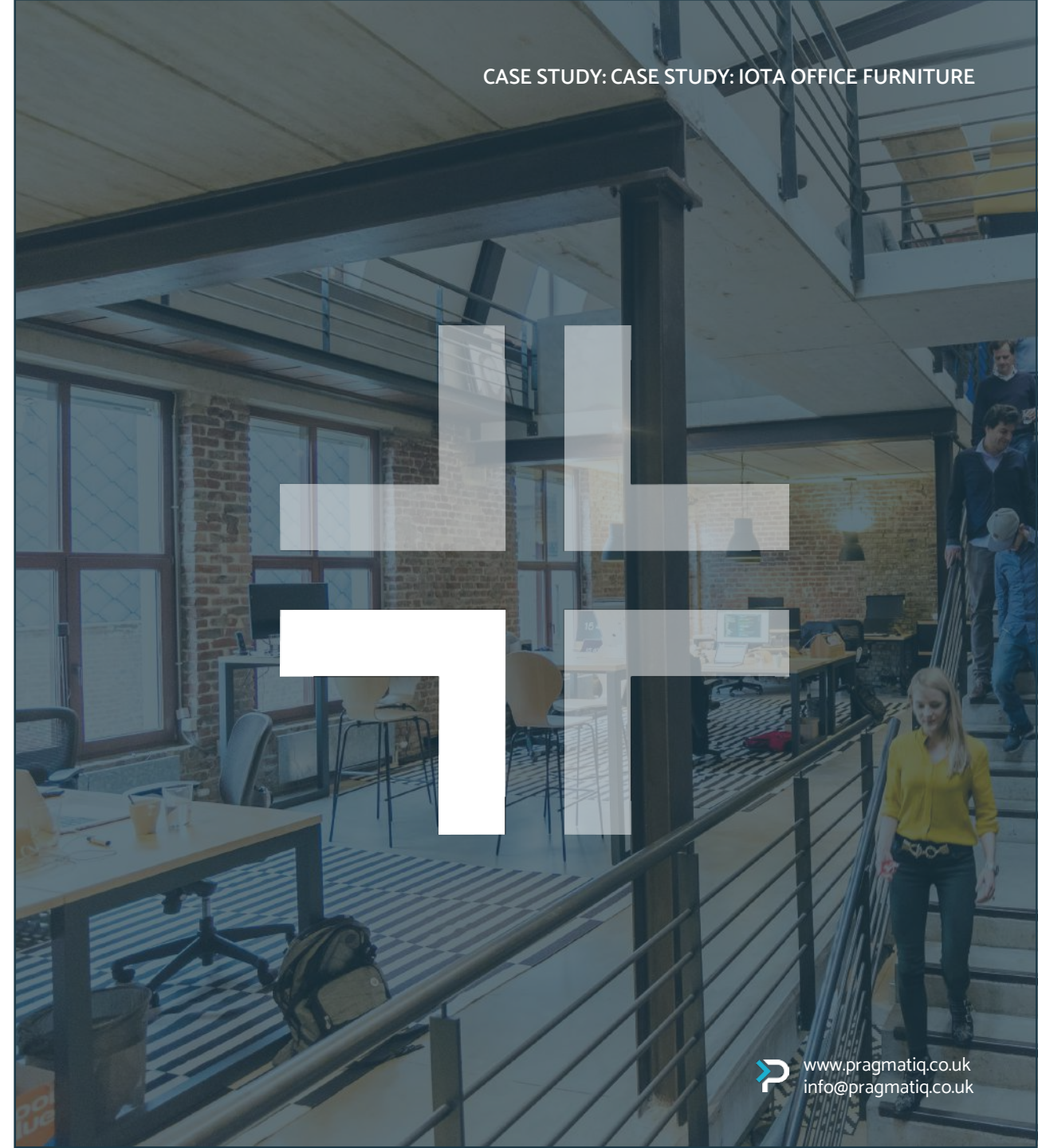
An integration with Xero was established, allowing iOTA to continue using this from a financial perspective. This integration provides a seamless connection from Lead through to Invoicing, automating the flow of data throughout the entire process and providing a structured quote management process.

Within Dynamics 365, staff members can create and approve an order, which is then automatically sent to Xero for the finance team to process. If the system picks up a product or account that doesn't exist in Xero, it will automatically create this, reducing the need for manual intervention and duplication of effort. Additionally, Purchase Orders and Invoices can also be sent from the system, tracking the information against the relevant supplier or customer record.

iOTA ultimately wanted the CRM solution to support as much of the organisation as possible, so functionality was also implemented to support the design team. Office designs are often initially conceptualised through drawings, so a custom drawing tracking feature was developed. Staff can create a task list, raise a drawing request, and assign it to a member of the design team. Once this is picked up, the assigned person can then track the status which is visible from the relevant opportunity and account.

Integrations with Outlook and SharePoint were also established. This enables iOTA to store large files, such as drawings, and link these to the relevant Dynamics 365 record.

Dynamics 365 also has powerful reporting capabilities, that iOTA can use to easily create detailed reports of data within the system. These reports can then be saved and easily reused, saving time manually generating these from scratch each time. Additionally, Dashboards can be created to collate high-level information from across the system and allow users to drill-down further. In future, if iOTA require more advanced reporting capabilities, there is an opportunity to integrate with Microsoft Power BI.



BENEFITS



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

- > **Improved visibility and access to information** – As a result of centralising information in one place, users reduce time searching for information and can conduct their daily tasks more efficiently.
- > **Streamlined quote management process** – By streamlining the quote management process, iOTA have better visibility of the entire process from Lead through to Invoicing. A significant amount of time is saved by automating this process within the system, as there is no longer the need for someone to manually search for the information, then generate and send quotes & orders.
- > **Enhanced reporting and insights** – Management can now gain key insights quickly and easily using Dynamics 365 reporting capabilities, allowing them to make more informed decisions. In future, there is potential to leverage Microsoft Power BI if iOTA require more advanced reporting functionality.
- > **A stable platform for future growth** – Business processes are now logically systemised in the new solution and data is accessible to those who need it, rather than relying on individual knowledge. As iOTA grows and the business requirements change, Dynamics 365 can be customised to fit around new processes and provides a stable platform for growth.



### 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)