

PRAGMATIQ

COMPANY CASE STUDY

# WASPS



## COMPANY BACKGROUND

Wasps Rugby Club are a Premier-League Rugby Club based in Coventry. Over the years, the team has won 12 major titles and due to continued success, required a bespoke CRM solution to support the Sales side of the business.



### CHALLENGES

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- › Faced challenges due to the previous over-customised system
- › The rigid structure of the sales process in the system did not reflect how Wasps conducted business
- › Management lacked a true representation of sales activities
- › Employees stored data in spreadsheets, meaning that only closed deals were tracked and valuable information from the start of the process was lost
- › Wasps did not have mobile access to their older system, meaning that information could not be captured on-the-go



### SOLUTION

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- › Implemented latest version of Dynamics 365, including Unified Interface
- › Replaced old customisations with standard functionality, such as Leads & Opportunities
- › Implemented an Outlook integration within Dynamics 365, so emails would automatically sync within the system
- › Developed a system to match how products are sold and streamlined the product selection process
- › Rearchitected existing booking process to link with Wasps' booking system
- › Implemented Power BI



### BENEFITS

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- › Improved visibility & access to information
- › Enhanced user experience
- › Time saved - time to input an opportunity onto system has halved
- › Streamlined product selection process
- › Future-proof system

## CHALLENGES



Wasps recognised that their current system and processes were no longer as effective as they could be and reached out to Pragmatiq to provide a more suitable and tailored solution. The Premier-League rugby club required a platform that was designed around their corporate salespeople's roles. The requirements included full visibility of their pipeline from initial contact to sale, streamline product selection process and removal of excessive coding & customisations from their current system to improve stability and enable them to take their platform to the next level.

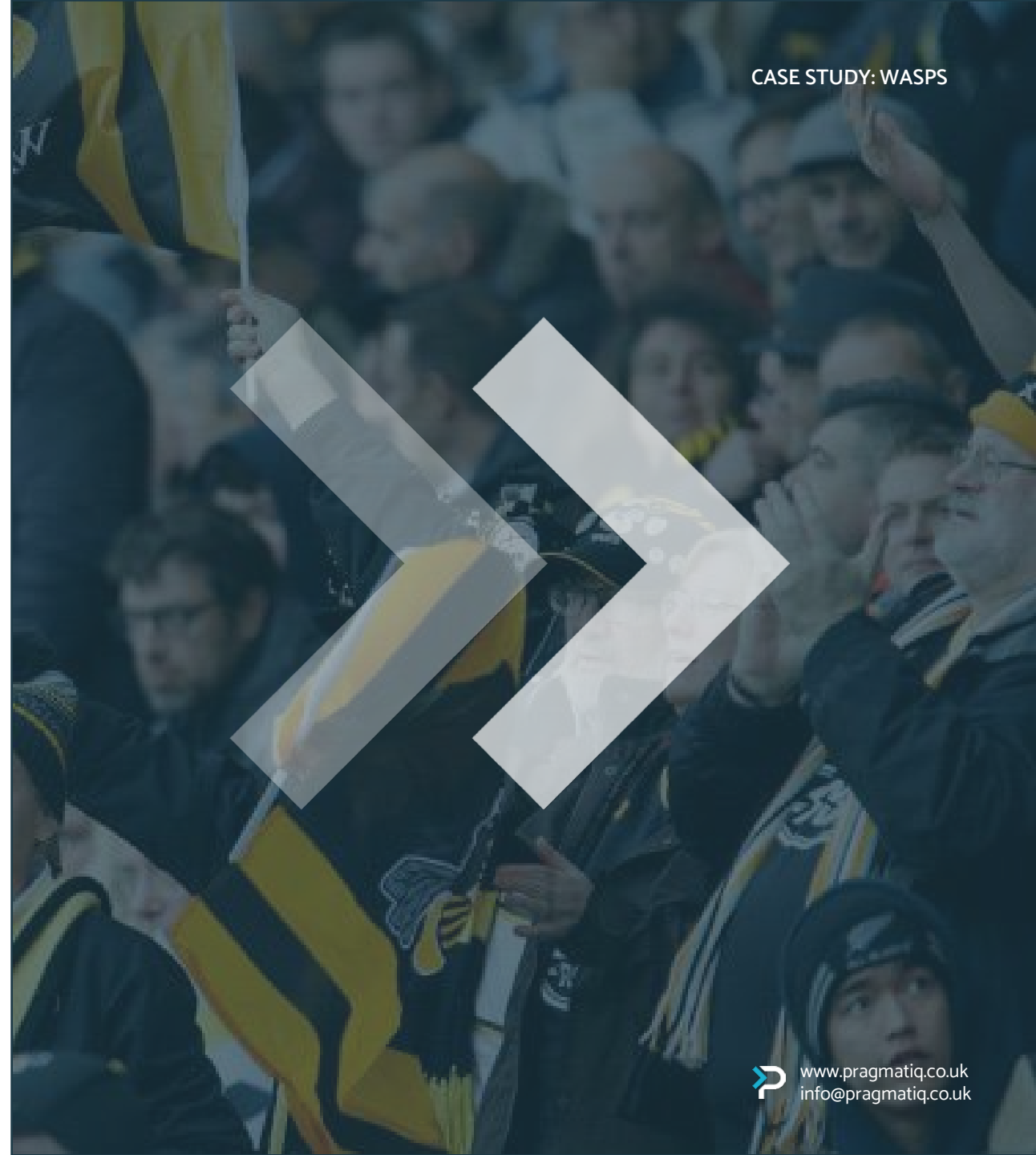
Before engaging with Pragmatiq, Wasps faced challenges around their current processes and the complexities of the systems they had in place. Firstly, the over-customised functionality within the previous system meant that carrying out crucial software updates and changes was a challenge, as any of the elements could easily break and would be difficult to decipher which part had caused the issue.

As the sales team has continued to grow, the rigid structure of the sales process within the previous system no longer reflected the way that Wasps conducted business. This resulted in users having to perform additional steps when nurturing an opportunity or closing a deal, in order to effectively input information into the system. In turn, the process was longer than it needed to be and having a system which accurately reflected the way in which business was conducted, would save time and increase conversion rates. This also prevented management from getting a true representation of the total sales activities across the team and to be able to report accurately on trends and forecasts.

User engagement was affected due to the impractical functionality within the old system and meant that employees found themselves working outside of the CRM. Spreadsheets were used to store information prior to a deal being closed, as the lead functionality was not built within the system. This meant that only completed deals were tracked and any valuable information from the start of the process was lost.

Finally, Wasps did not have mobile access to their CRM data, meaning that information could not be captured on-the-go. This was one of the goals to be achieved alongside:

- Improve overall operational & process efficiency
- Improve the speed of access to key information
- Streamline the product selection process





SOLUTION



To overcome the challenges The Drapers' Company faced, Pragmatiq designed and implemented a Membership Management solution, built on Microsoft Dynamics 365. This cloud-based system meant that all information could be stored and accessed by those who need it, without relying on certain individuals in the business.


By leveraging Dynamics 365, the solution was tailored to fit around the unique way of categorising members and the corresponding data, enabling improvements to be made around user experience, access to information, and overall efficiency.

Functionality was implemented to manage all member data; staff can create new members, select from multiple member types to segment data effectively, dynamically show and hide information so the user can only see what is relevant to them, capture personal information, career information, employment data, etc. Functionality also supported varying levels of engagement with The Drapers' Company, around committees, governorships, and volunteering roles. Additionally, all correspondence with members can now be tracked including notes, activities, and emails.

For event management, the previous database had no way to track and manage events. Functionality within the new system means that event plans, invites, guest lists, and the booking process can all be managed from one integrated setup through the CRM and members area on the website. This then allows the adequate information to be passed over to the team who manage the table plans.

To support the event management process, Dynamics 365 dashboards were also implemented to allow staff to get an overview of the event, who has accepted, unable to attend, and other key information at a glance.

To achieve the marketing goals, we implemented functionality to send mass templated emails, enabling the organisation to send communications to their member base, invites to specific events, and target particular member groups. The Microsoft Outlook integration was leveraged, supporting the process of sending and tracking emails.



“We approached Pragmatiq to help us with our Microsoft Dynamics CRM platform. We had developed a bespoke system over the years to manage the day-to-day sales processes of the Commercial team, however, we felt that working with a specialist Dynamics partner would be a much better approach for the business. We have now been working with Stuart, Jamie and the team for just over 12 months and to say we have been impressed with their approach would be an understatement. The dedication, knowledge and customer service shown to the delivered projects has been exceptional and their innovative approach to business is inspiring. They have guided us every step of the way and have succeeded in changing our platform for the better. It has provided us with a much more efficient way of working and supported us with business intelligence that we haven't seen before. We also benefit from real-time, top-level dashboards that make reporting back to stakeholders a very simple process.”

JAMES WOOTTON - HEAD OF COMMERCIAL SALES AT WASPS

BENEFITS



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

- › **Increased productivity and efficiency** – Across The Drapers’ Company, there is no longer the need to switch between disparate applications. Data is stored centrally, and more functionality is available to users, so they can access the information they need more quickly and increase productivity as a result.
- › **Business continuity** – By implementing a more secure and scalable cloud-based solution, the business is no longer reliant on a legacy database and multiple systems. Knowledge of the system is not reliant on limited members of staff and the platform can grow as the organisation does.
- › **Connected systems** – Dynamics 365 seamlessly integrates with other applications within the Microsoft eco-system, as well as integration options for websites and other third-party systems. This allows The Drapers’ Company to expand where necessary, without the need for multiple disparate systems.
- › **Increased professionalism** – As admin processes are now much quicker and automation is in place, the journey for a member is now quicker and ensures that staff have everything they need in one place, enhancing the professionalism of the organisation throughout the engagement with their members.



“This project was very rewarding in the respect that we have provided a solution to Wasps that has moved them away from an over customised, inefficient setup that was not fit for purpose, to a new improved way of working that is aligned closely with their processes and to standard Microsoft Dynamics 365 and made employees more efficient across the organisation.”

JAMIE EVANS – TECHNICAL DIRECTOR AT PRAGMATIQ



### 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...

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- > **Phone** - 01908 038110
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