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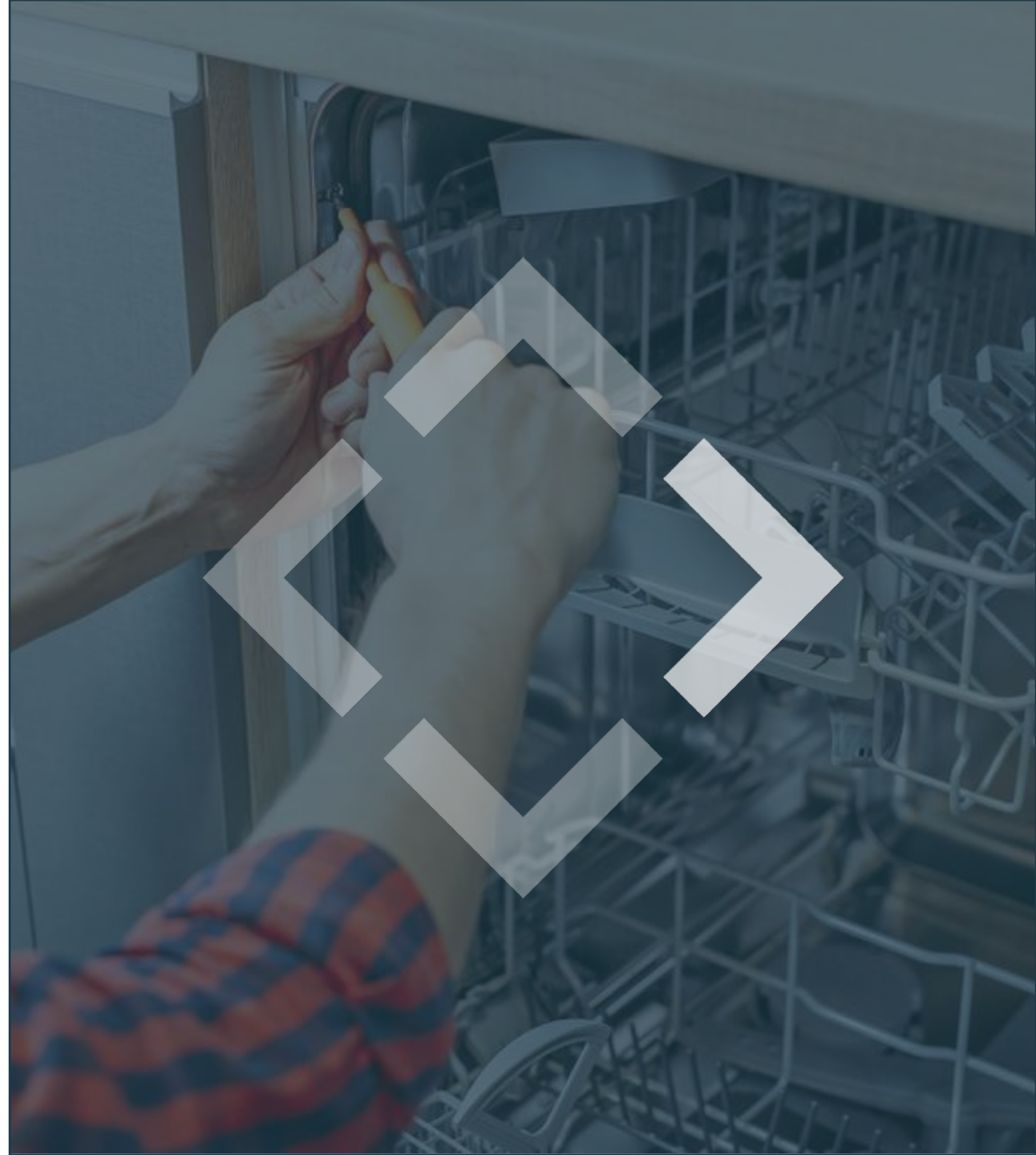
ZEST

zest.

COMPANY BACKGROUND

Zest is an insurance provider, doing things a little differently. They are passionate about fresh-thinking customer service and products, to ensure the smooth running of home appliances under one roof.

The company was established in 2006 and offers appliance & technology insurance for items such as fridge freezers, washing machines, ovens, vacuums, sound systems, games consoles, and more. They also offer appliance repairs and have an engineer fix-it team, to bring products back to life as soon as possible.

With significant growth plans over the next couple of years, alongside new products and better service goals, the business required a bespoke, scalable CRM system.

CHALLENGES

- Previously using a custom-built CRM system across all departments; expensive and difficult to maintain
- Lack of visibility and access to information causing challenges in day-to-day processes
- Difficult to gain a 360-degree view of customers
- Limited insight into the sales pipeline
- Data duplication across systems
- Limited forecasting ability and reporting capabilities

SOLUTION

- Implemented several of the Dynamics 365 applications to accommodate the core functional needs of Zest, in one single data platform
- Customised the system to reflect key business processes
- Developed functionality that calculates the cost of current insurance policies and provides forecasts
- Core Dynamics 365 Marketing capabilities built into the solution to create basic marketing campaigns
- Dynamics 365 Customer Service supports customer claims, policies, product faults, etc
- Created a resource management board to allocate engineers
- Implemented Power BI to replace slow SSRS reports and provide enhanced insights
- Built integrations with several 3rd party applications
- Performed a complex data migration

BENEFITS

- Improved visibility and access to information
- Time saved across the business
- Increased insight for decision-making and forecasting
- Easily extend the solution
- Stable platform for future growth

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CHALLENGES

Previously, Zest used a custom-built CRM system across all departments. This system handled everything from across sales process, membership management and customer support. However, although this system served a purpose initially, as the company has grown (and continues to do so) it became expensive and difficult to maintain.

One of the common challenges faced by Zest was the lack of visibility and access to information for employees to do their jobs effectively and efficiently. The lack of visibility and disparate data caused challenges in day-to-day processes, such as tracking customer insurance claims. Users had difficulty identifying a customer's membership history, and whether they had upgraded their membership level, which informed how Zest processed claims.

From a sales perspective, insight into the sales pipeline was not available due to the limited functionality around tracking opportunities and other sales data. Occasionally, pricing changes were made for customers during the sales process. Although agents could see the price change, they could not see the reason why, due to limited data capture within the system.

Data duplication was another concern for Zest, as this was an inefficient use of employee time. For customer repair claims, agents were required to manually duplicate customer and asset information into Microsoft Bookings, although it had already been captured within the CRM System.

With data being captured in multiple places, gaining a 360-degree of any customer was a challenge and made reporting to the ombudsman a complex and lengthy process, due to compiling all the required information. There was also limited forecasting ability and reporting capabilities (SSRS-based) were inefficient and difficult to use.

Finally, Zest has significant growth plans and will be introducing new services and products to enhance its offering. The previous CRM system was difficult and costly to maintain and would not be best suited to support Zest as the business rapidly grows.

SOLUTION

To support Zest, we implemented several of the Dynamics 365 applications for different elements of the business. This comprehensive solution accommodates the core functional needs of Zest across areas such as Sales, Marketing, Memberships and Service, in one single data platform.

Dynamics 365 Sales was leveraged to support the sales process, whereby the sales team calls prospects up to sell their insurance products, those who are interested become a lead, this is then qualified through to an opportunity and a quote if successful. At this stage, a membership is created, and customers are then able to raise cases. To support this process, Dynamics 365 Customer Service was implemented, seamlessly integrating with the sales application to ensure this end-to-end process is covered.

To accommodate key business processes and ensure data is captured in the appropriate manner, the system required customisation. Renewals, cancellations and policies were particularly complex areas, and therefore required additional functionality to be built (using Azure Logic Apps) to support how Zest worked.

In the previous system, gaining visibility of future revenue was difficult and therefore a key driver within the new solution. We built-in functionality that calculates the cost of current policies and provides forecasts around this, so management and the finance department can gain a more comprehensive view of figures.

To create customer lists and basic marketing campaigns, Zest have got core Dynamics 365 Marketing capabilities built into the solution. In future, this application could be adapted further to provide additional marketing automation capabilities.

From a customer service perspective, areas such as customer claims, policies, product faults, etc., need to be logged. Dynamics 365 Customer Service supports this process and enables users to raise cases, action cancellations, manage the member lifecycle, and more. Due to the complexities around this, Zest required more than the standard functionality available, and we developed PCFs (Power Apps Component Framework) to configure the policies and memberships in the most suitable way.

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SOLUTION CONTINUED

On top of this, Zest required a systemised way of scheduling engineers that were responding to appliance repair cases. Although they have an in-house fix-it team, they also occasionally used external resources. We created a resource management board that can be used to allocate the correct engineering resource to the relevant job. The system recognises the skillset of an engineer, displays a rating of skills match, and recommends the best person to allocate.

As part of the membership, Zest sends out various automated communications such as welcome packs, renewal documentation, policy information, etc. To support this, we leveraged Power Automate to generate and send these comms.

To support reporting, we implemented Power BI to replace slow SSRS reports and allow management to gain key insight and improve efficiencies, on a platform that is flexible, scalable and easier to maintain. We built several initial reports that can be viewed directly within Dynamics 365, so users can gain key insights from one application.

Several integrations were also built with 3rd party applications, to support business processes. We established integrations with Connex1 for call tracking, Experian Pay360 to enable card payments, BankWizard to check bank details, and Twilio SMS to send text messages to customers with case/engineer updates.

Finally, we performed a complex data migration to move the Zest data from the previous system to Dynamics 365. This required a significant amount of data transformation, whereby hundreds and thousands of records were manipulated, mapped within the new system, and then migrated over.

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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. Additionally, the solution can be accessed from anywhere, on any device, supporting users who need to work remotely.

› **Time saved across the business** – By integrating with other systems and setting up automation where possible, users save time manually performing repetitive tasks. On top of this, human error is reduced as there is no need to manually re-input data between systems.

› **Increased insight for decision-making and forecasting** – Management can now gather key insights quickly and easily using Dynamics 365 and Power BI reporting capabilities, allowing them to make more informed decisions and improve forecasting.

› **Easily extend the solution** - The nature of Dynamics 365 means that other applications can easily be adopted in future, to extend the capabilities of the platform. For example, full Dynamics 365 marketing application could be leveraged to provide comprehensive marketing automation. Or, Dynamics 365 Field Service to enable additional functionality in this area, such as engineer location tracking & notifications, asset management, SLAs, and more.

› **Stable platform for future growth** - Zest has significant growth plans over the next couple of years, alongside new products and services. The solution that the business was previously using may have beenrestrictive, however Dynamics 365 provides a more stable platform to build on in the future, as the business scales and requirements change.

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