

Microsoft Dynamics 365 Case Study



***“I’ve been very pleased with Dynamics 365 and found it to be a highly reliable cloud system which has proved instrumental in helping our business grow and sustain success during a period of unprecedented change in our industry.*”**

Darren Oliver, Technical Director, BeBa Energy UK

Overview

Industry

Renewable energy

Business Situation

BeBa Energy initially sought a CRM system to manage its sales processes but soon needed broader capabilities to manage its projects and servicing.

Solution

Microsoft Dynamics 365 deployed to 10 users.

Main Benefits

- Connected business processes managed in a single system
- Scalable solution that has helped the company expand and weather market turbulence
- Cashflow control through timely invoicing processes
- Proactive maintenance through clear visibility of service issues
- Improved service delivery and transparency through a customer web portal

BeBa Energy UK is one of the UK's most respected and trusted renewable energy specialists.

The company designs and installs Solar Photovoltaic systems, and maintains solar assets worth more than £100m across the country.

BeBa Energy's in depth understanding of Solar PV technology and its unrivalled reputation makes it the first choice for domestic and commercial customers looking for ways to reduce their CO2 footprint and invest in financially rewarding projects.

The company was established in 2009. At the outset, the company relied on a series of spreadsheets to manage its customers and sales but quickly sought a dedicated CRM system to handle these processes as Darren Oliver, Technical Director at BeBa Energy explains:

“We knew that as the company grew we'd need a CRM system to support us. One of our sales team had experience with Microsoft Dynamics and after researching the market we implemented Dynamics in the cloud.”

This was a transient moment in the solar energy market with rapid expansion as businesses and householders were taking advantage of government incentives for Solar PV installations.”

BeBa Energy quickly discovered that Microsoft Dynamics 365 (formerly Dynamics CRM Online) offered broader capabilities beyond sales and contact management which proved crucial in supporting its growth at this unique point as Darren continues:

“It turned out that the majority of our Dynamics usage wasn't focused on sales leads and opportunities as we'd originally expected. We certainly use it to manage our sales process but the most significant benefits we've seen from the system is in its handling of our projects and our dedicated operations and maintenance service (O&M).”

“By configuring the system to manage broader functions, it's given us



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Darren Oliver
Technical Director
BeBa Energy UK

end-to-end processing all the way through from lead through to sales to project delivery and post-sales case management.

We’ve seen a massive benefit in connecting processes from our installation projects with our O&M work as we have everything accessible in one place. Having these processes connected is the lifeblood running through our business.”

Following the government cuts in solar energy subsidies, BeBa Energy saw further disruption in its market but the investment it made in Microsoft Dynamics 365 helped them respond and thrive.

“Our business is tightly resourced and it’s proved crucial that all the team can access all the detail they need across our processes in one place. By using Dynamics, it enables everyone to get on with their jobs and be productive.”

BeBa Energy prides itself on the quality of its service and its close customer relationships as Darren highlights:

“The strength of our reputation is everything and as part of our after-sales support we need our case management processes to be especially smooth.”

The company uses Dynamics 365 to enforce its agreed service level agreements and as part of its O&M service it has now deployed a self-service customer portal.

“We offer a range of maintenance plans which include options for us to carry out active monitoring of a client’s solar systems, or for customers to do this themselves and log case when issues are identified.

Previously, our maintenance was almost exclusively for sites that we’d installed but as many installation firms are no longer trading we are increasingly bidding for maintenance agreements to cover sites that were installed by another party.

To make sure we are competitive in winning this profile of opportunity we were eager to implement a web portal that provides greater transparency and convenience.

With Preact’s help we’ve now rolled this out enabling our customers to log new cases, check the status of existing cases as well as check the important detail about their agreements including service and expiry dates and insurance details.

We are looking to ramp up our reporting and we’ll also be looking to use our data in Dynamics to provide customers with regular updates about the usage of their agreements.”

Darren explains that by having all its case detail stored in a single system has proved beneficial in helping BeBa Energy uncover insights and be proactive in its servicing:



“The support we’ve received from Preact has been a success story and we’ve reaped the rewards of their help.”

Darren Oliver
Technical Director
BeBa Energy UK

For more information

To find out more about Preact and Microsoft Dynamics 365 please call 0800 381 1000 or +44(0)1628 661 810

Or, visit www.preact.co.uk

“We are continually looking to help our customers improve the performance and lifespan of their solar PV systems. As part of this work we can easily review the service detail in Dynamics 365 which helps us identify and address any recurring issues. As an example, we can look at a site to assess the equipment reliability. If this were to reveal a series of failures during a short period of time we’ll be alerted to the fact and we can take the appropriate action.”

Darren shares another example of how Dynamics 365 has provided BeBa Energy with the scalability needed to efficiently handle its processes:

“Invoicing customers at correct point is critical. Our Dynamics 365 system is configured with a series of triggers that alert our finance team when they need to issue a customer invoice. This includes triggering an invoice when a project milestone is reached and in other instances, an invoice is triggered when we work on a chargeable case that isn’t covered by a maintenance agreement.”

Summing up, Darren is satisfied with the performance of Dynamics 365:

“I’ve been very pleased with Dynamics. I’ve found it to be a highly reliable cloud system which has proved instrumental in helping our business grow and sustain success during a period of unprecedented change in our industry.

The support we’ve received from Preact has been a success story and we’ve reaped the rewards of their help.

We recognise that our Dynamics system will never be finished as we’ll continually look to evolve this and make changes. The managed service we have with Preact has been great as it enables us to bank Dynamics hours each month. This means when we have a new requirement, like the recent customer web portal, we don’t have to worry about paying a bill - we can just allocate the hours we’ve accrued.

The portal, is also a good demonstration of how well our relationship with Preact works. It was easy to phone up have a conversation with them and put together a spec. After testing we refined the portal and it was very much a team effort.

When Dynamics problems have come to light, I’ve found Preact refreshingly honest in their communications with us. Their team has gone the extra mile to fix issues and I’d happily recommend them to anyone that wants to get more out of Dynamics 365.”

To learn more about BeBa Energy UK, visit: www.beba-energy.co.uk