



## BURGESS

### The Company

Founded in 1975, Burgess is a global superyacht industry leader, uniquely specialising in yachts of over 100 feet. Renowned for its professional yachting services, the company guides clients through every aspect of the yachting experience, including sale and purchase, construction, chartering and operational yacht management.

Burgess began working with Preact (now part of ANS Group) in 2015 to support its Microsoft Dynamics system and we spoke to Karen Mendoza, Head of CRM and Tim Davis, Chief Marketing Officer about their progress with the product.

### Challenges

- Unsupported on-premise version of Microsoft Dynamics CRM
- CRM connectivity issues encountered by overseas teams
- Reliance on manual processes
- Over 200 users supported by one CRM administrator
- Distrust of data within sales team

### Solutions

- Cloud migration to Microsoft Dynamics 365 Online
- Regular engagement calls with Preact Technical Account Manager
- Development of additional integrations and applications to connect repeatable processes

### Benefits

- Simple, reliable and secure login for all CRM users
- Access to product insight to plan system developments and quickly resolve issues
- Increased trend towards proactive data-driven actions
- Improved handling of yacht bookings from trade shows

*"We've gained immense value from our relationship with Preact. They've invested time to get to know our business, what we do and how we work."*

Karen Mendoza, Head of CRM - Burgess

## Migrating CRM to the Cloud

"Our first project with Preact involved upgrading our version of Dynamics CRM as this was no longer supported by Microsoft. We were some way along the process when we decided to migrate this to cloud, rather than upgrade to another on-premise edition. Due to the age of the software, this was a more complex upgrade which meant we couldn't make the hop in one jump.

"Preact's team were amazing and supported us superbly throughout. They were aware of our immovable deadline to complete the project, and they made sure that we were able to go live with Dynamics 365 Online and switch off our old system on schedule.

"Since moving to the cloud, our users are able to connect to Dynamics more easily. We have satellite offices worldwide and these teams previously needed to connect to our London server before they could access CRM, and they often encountered connectivity issues. With Dynamics 365 Online, they now have a stable connection and can securely login from anywhere, at any time."

## Why Preact is a trusted advisor for Burgess

### **Karen credits the continuity of contact with their support partner for many of the improved outcomes Burgess has achieved with Dynamics 365.**

"We've gained immense value from our relationship with Preact and much of this comes from regular calls with our technical account manager. They've invested time to get to know our business, what we do and how we work, this even includes understanding our acronyms!

"I'm the single point of contact for CRM within Burgess for over 200 users, so it's invaluable for me to have one contact at Preact who knows us, as well as the product. This saves so much time when we call in because they understand the wider dynamics of what's happening, and therefore ask the right questions.

"Sometimes we need to think outside the box when developing a new solution and I trust Preact to provide considered recommendations because they bring a wider perspective. This makes the process seamless, and I've never previously felt so secure with an IT provider.

"Their support team are fabulous as we consistently receive a resolution to any questions or issues within 2-3 hours. Everyone we speak to is friendly and easy to talk. If they aren't sure, they're able to refer to our technical account manager to get the insight they need.

"If we do have an issue, we don't want to be spending time explaining everything in minute detail. When you have some who's been on the journey and worked on our developments, they can locate issues and identify items that need changing, so things don't spiral out of control.

"There is still plenty more we can do with Dynamics and it's good to know we have regular sessions scheduled to discuss future requirements, but we can always address priority issues when these arise.

"I have complete faith in Preact's knowledge and I'm happy to recommend their services."

[Karen Mendoza, Head of CRM - Burgess](#)



## How Burgess is digitising more processes

"Dynamics 365 and the Microsoft platform are enabling us to modernise more processes that reduces our reliance on manual workflows. One example is a new mobile booking app that Preact recently developed.

"When people visit our trade stands, it was a very labour-intensive process to organise follow up yacht viewings. This has involved collecting contact information in a spreadsheet, managing another sheet containing dates and timeslots, and then writing out appointment cards for each viewing.

"To simplify this, and reduce the likelihood of mistakes being made, we've worked with Preact to develop a Power App so we can handle each of these steps more efficiently for trade shows.

"As well as enabling our team to quickly capture accurate contact information and confirm bookings, the app connects with Dynamics to automatically send appointment confirmations.

"Early feedback has been encouraging, so we are looking at the next development phase to handle additional multiple booking scenarios that will allow us to schedule more viewings through the app."

## Improving CRM User Engagement

"Since we begun working with Preact, Burgess has extended Dynamics to four more departments which has involved developing new applications for each of these departments.

"Within our industry there is some fear of data, especially in a sales function where people have traditionally sold using their black books. There hasn't been a culture of data which presents an additional challenge getting team members to engage and adopt CRM.

"As more people begin working with the product, we are receiving positive feedback as users see the benefit of Dynamics. In some instances, simply using templates which populate their letters and proposals is saving time and encouraging them to get more involved."

## How connected data is driving change for Burgess

"Dynamics 365 is engrained in most of the things we do. This includes our client relationships, industry contacts, our yachts, charter processes, transactions, inspection reports and web leads.

"One integration connects our dotDigital marketing platform to provide click reports in Dynamics which allow our brokers to review their clients and see what they've clicked, and which yachts they are interested in.

"This has changed the dynamic because previously these checks would have to be directed to the marketing team, but now they can find this detail themselves. We've created personalised dashboards that highlight recent clicks which brings these client engagements to the forefront. Just as importantly, they can also see if any clients have recently unsubscribed from marketing lists.

"By making our brokers more aware, they're more involved in what's happening and can be more proactive in reaching out to clients.

"CRM was primarily just a database for us, but our usage has grown to extent that it's now a fully working tool thanks to a better flow of data. Dynamics 365 is key in helping Burgess Yachts save time across the business, but it starts with making sure that we get good quality data coming into the system."

## Future plans for Burgess

**Tim shares his vision for how Burgess can develop its marketing activities.**

"We have historically been a very manual organisation when it comes to marketing. Dynamics holds the key to processes that are going to help us save time. For example, there is a lot of communication that can be automated. That's the opportunity for us, which we're working on improving."

**Many thanks to Karen and Tim for sharing their experiences and for their kind words. To learn more about Burgess and its amazing superyachts, visit [burgessyachts.com](https://burgessyachts.com).**

## How can we help your business?

Discover how we can help your organisation transform performance with Microsoft Dynamics 365 and the Power Platform. Please get in touch to learn more.

[www.preact.co.uk](https://www.preact.co.uk)