



**clarion uk**

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## Overview

### Business Situation

Clarion UK was constrained by its processes as these were preventing growth and harming its cashflow. A new solution was sought to connect its workflows and enable more customers to be supported.

### Solution

Microsoft Dynamics 365 deployed to 17 users utilising field service and sales capabilities.

### Main Benefits

- Increased capacity of supported students from 350 to 800 within 12 months.
- Streamlined timesheet processing by contractors through an integrated self-service portal.
- Improved cashflow by reducing invoice settlement time.
- Greater visibility of key performance indicators.
- Enhanced user experience resulting in greater productivity.

***“The Dynamics 365 solution that Preact implemented has transformed our processes giving us the scalability that we needed.”***

Sally Chalk, CEO, Clarion UK

## THE COMPANY

Clarion is the UK’s leading British Sign Language interpreting agency. Through its network of Language Support Professionals (LSPs) the company supports deaf and hard of hearing students at college and university.

One of its core activities involves booking LSP contractors who provide interpreting services for students. These engagements are wholly or part-funded by external finance organisations.

The company’s other services include delivering sign language training courses and undertaking workplace assessments for deaf people.

## BACKGROUND

Clarion UK had been using a heavily customised version of Microsoft Dynamics CRM to support its data capture and handle student bookings.

These processes were proving time consuming as the system wasn’t intuitive for end users. In addition, timesheets and invoices from Clarion’s interpreters were submitted through a standalone portal which required manual data entry in Dynamics.

As Sally Chalk, Chief Executive Officer at Clarion UK explained, these labour intensive processes were constraining the business:

*“We had a major bottleneck in processing timesheets and invoices from our external contractors. This was delaying settlement of the invoices we send to student finance providers who fund these bookings which had a knock-on effect on our cashflow.*

*For example, our team would print off timesheets, enter the detail in CRM before posting this documentation with the accompanying invoice.*

*We were working flat out to support 350 students but we wanted to more than double this capacity. For that goal to be achieved, our processes needed to be more efficient and far more scalable.”*



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***“We’ve seen a big improvement in our cashflow during the past year. Previously, it would take up to 3 months to settle an invoice but we’ve seen this cut to 1 month since our processes were connected through Dynamics 365.”***

Sally Chalk  
CEO  
Clarion UK



## THE REQUIREMENT

To remove these complications, a user-friendly solution was sought that would enable Clarion’s team to cope with an increased volume of transactions.

The company’s vision was to:

- Digitally track timesheets signed by students and interpreters that are linked to CRM and compliant with the requirements of student finance organisations.
- Integrate Sage 50 with CRM to ensure data consistency and the accuracy of financial and operational reporting, and be able to match supplier costs and revenue to specific bookings.
- Speed up invoicing, improve cashflow and reduce pressures on internal resources.

## THE SOLUTION

Clarion UK engaged Preact to deliver a revised iteration of Microsoft Dynamics that would connect its data and transform processing efficiency.

*“From the outset we found Preact to be very responsive” says Sally. “Having visited us, they quickly grasped our requirements and responded with a considered fixed-price proposal and a can-do approach.”*

In these consultations, Preact proposed using the core framework of Microsoft Dynamics 365 for Field Service in the cloud. This included deploying a portal to offer available bookings and capture timesheets using an electronic signature pad via a mobile app.

Integration between Dynamics 365 and Sage 50 was achieved using the third-party Redware connector to automatically create new invoices and retrieve a PDF invoice for each entry.

Finally, an integration between Dynamics and Student Finance England digitized a significant portion of Clarion’s billable transactions by submitting its documentation electronically.



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***“We were determined to go live in time for the start of the academic year. The successful delivery of this meant Preact effectively squeezed a 6 month project into just 3 months. The results have been outstanding for our business and I would happily recommend their services in a heartbeat.”***

Sally Chalk  
CEO  
Clarion 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](http://www.preact.co.uk)

### **THE RESULT**

Less than 12 months after this implementation, Sally highlighted the impressive progress that Clarion UK has made with Dynamics 365:

*“From 350 students we are well on the way to supporting 800. We’ll overshoot that target soon and I’m confident we could bring on several hundred more students as we now have sufficient infrastructure in place.*

*The solution that Preact implemented has transformed our processes giving us the scalability that we needed.*

*With the integration between Sage and Student Finance England, we’ve seen a big improvement in our cashflow during the past year. Previously, it would take up to 3 months to settle an invoice but we’ve seen this cut to 1 month since these processes were connected through Dynamics 365.*

*We handle more than 100 bookings every day so this adds up to a massive saving in time and processing cost.*

*Morale within the team is stronger and we quickly received positive feedback as everyone found they could do their job faster with Dynamics. The system is more intuitive to use which has helped us create an operational manual. We have a stable team, but it’ll now be much easier for a new user to get started.*

*Now that we have our main data in one place, I’m able to view meaningful reports using the native reports in Dynamics 365, or via Power BI dashboards, to monitor key metrics across our educational bookings and billing processes.”*

In reviewing the company’s progress, Sally emphasized Preact’s contribution:

*“As with any project there can be bumps during the journey, but I’ve been incredibly impressed by the commitment, quality and patience shown by Preact’s project delivery team.*

*We were determined to go live in time for the start of the academic year. The successful delivery of this meant Preact effectively squeezed a 6 month project into just 3 months.*

*The results have been outstanding for our business and I would happily recommend their services in a heartbeat.”*

To learn more about Clarion UK, visit: [www.clarion-uk.com](http://www.clarion-uk.com)

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