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Alan Hyde, Operations Director, DDC Dolphin

Overview

Industry

Hygiene and infection control technology

Business Situation

DDC Dolphin sought a CRM system to connect its business processes including sales, servicing and marketing, and streamline its reporting.

Solution

Microsoft Dynamics 365 deployed to more than 40 users.

Main Benefits

- Developed numerous time saving processes to increase productivity.
- Quicker performance insights using real-time reporting across business processes.
- Greater flexibility in managing service visits and customer assets in a single system.
- Improved service delivery and increased transparency by deploying an integrated self-service web portal.

DDC Dolphin was founded to provide quality products and services that enhance the care and safety of patients, residents and their care givers.

Since 1991, DDC Dolphin has supported hospitals, care facilities, hospices and schools with sluice / dirty utility room solutions to ensure excellent hygiene and meet strict infection control standards.

The company offers a full range of sluice room products giving comprehensive advice and support throughout the planning, design and installation of new and existing facilities. Its qualified engineers carry out installations, audits, repairs and maintenance of all sluice / dirty utility room equipment for customers which include hospitals, care homes and schools.

Background

DDC Dolphin were using Act! CRM but its capabilities proved restrictive as the company's Operations Director, Alan Hyde explains:

"It was clear that Act! fundamentally couldn't handle our service processes so we ended up storing data in different places and none of this was connected. Being able to manage the site visits carried out by our engineers in the same system as our other business processes including sales and marketing was an important requirement that we needed to address."

From its research, DDC Dolphin quickly identified Microsoft Dynamics 365 as its preferred solution, as Alan continues:

"We immediately saw Microsoft Dynamics was more robust in the type of processes that could be handled including case management. This was crucial in our decision to go with Dynamics once we understood how the functionality would adapt to manage our site visits."

It was apparent that Dynamics had the flexibility enabling us to effectively store an asset register tracking the equipment we supply to our customers and distributors. Also, the reassurance that we have in using Microsoft technology was another consideration in making our purchasing decision."



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Alan Hyde
Operations Director
DDC Dolphin

The Results

DDC Dolphin worked with Preact to implement Microsoft Dynamics and Alan reports this was a smooth process:

“We had a really good transition from Act! to Dynamics with Preact helping us migrate our data. There was a big push from all the directors in the business to make sure this project was a success so it was encouraging from the outset to see the new system bedded in fairly quickly.

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As highlighted, service management was a crucial requirement for the company and Alan points to a series of improvements it has been able to make through Dynamics 365:

“Undoubtedly Dynamics has revolutionized how we manage our service visits and cases which has replaced paper-based processes with workloads now better managed. In most instances, our visits are scheduled. Often, maintenance jobs are carried out on a weekly or monthly recurring basis and Dynamics has proved to be a big time saver enabling us to schedule these visit sequences in bulk.”

DDC Dolphin's case records are associated with the equipment used by its customers which is detailed in its asset register as Alan explains:

“Our products include an extensive range of machinery and capital equipment for sluice and dirty utility rooms which include washer disinfectors and pulp macerators. Contracts for these products include service level agreements that define our response times for reactive visits and the frequency of maintenance so having these contracts linked to the asset register in Dynamics 365 has helped to make sure that our SLA commitments are met.”

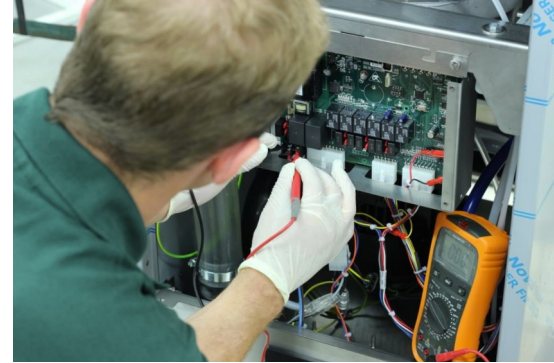
The company has also implemented a web portal that extends self-service capabilities to its customers enabling them to access equipment detail and log service issues at any time:

“We've developed the portal so customers can request unscheduled call outs online and get greater visibility about the equipment we've supplied by referencing asset register data stored in Dynamics. Several of our clients have different sites so the portal enables them to easily see at a glance which location individual equipment has been installed, and the key dates specific to this item including installation, warranty expiry and service history.” confirms Alan.

“Our international distributors working in a different time zone can easily check this detail when our UK head office is closed and we've even promoted the availability of our portal to help us win a tender for a prestigious new contract.”

Alan also cites how other areas of the business have benefited from Dynamics:

“Our sales team use the opportunity pipeline every day and with activity management it helps us make sure that our leads are properly logged. We have Dynamics 365 integrated with our Dynamics NAV system which brings in current pricing and product detail.”



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A key part of this has been the continuity in speaking to people who understand our business and how we use Dynamics."

Alan Hyde
Operations Director
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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

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"Before we implemented Dynamics 365, our sales team were dealing with printouts and spending a lot of time looking up detail. With the Dynamics quoting template we now have, combined with the flow of product and pricing data from NAV, it has helped reduce administration across the sales team."

At the outset of this project, DDC Dolphin sought to reduce the time spent on creating reports and Alan discusses how this has been achieved:

"Previously, because we didn't have our data connected in one place there was a frustration in how much time was taken to compile reports. Throughout the business we now find it much easier to work with our data through views and filters in Dynamics 365 which enable everyone to get the information they need."

Reporting is now a million times better than before and we can always dig deeper for more insights. We are also using Power BI which is creating further reporting efficiencies as we were previously stretching Excel to the limit."

On the marketing side, DDC Dolphin use ClickDimensions to handle its email marketing from Dynamics 365:

"ClickDimensions has been another significant addition by integrating our e-marketing. In the first instance, it has helped us tidy up our data. It has also proved to be another example of how we've been able to save time and increase productivity as we no longer need to transfer data to a separate email marketing service and then re-import this. We've found ClickDimensions user friendly and it has definitely contributed to us making more informed decisions about our marketing activities."

In summing up, Alan talks about DDC Dolphin's development of Dynamics 365 and the support they've received from their CRM partner:

"Internally we share ideas and high-level updates on new Dynamics features which has helped us prioritize changes to our system and I've found Preact's blog posts and webinars useful in keeping us updated about how the product is evolving."

Dynamics 365 has more than lived up to our expectations and we are delighted with the progress we've made. We have far greater clarity across the business and we are very confident to have a platform that is scalable and will continue to support us as we grow."

We've received excellent support from Preact through their account management, technical help and consultancy. A key part of this has been the continuity in speaking to people who understand our business and how we use Dynamics."

The advice and direction we've received through Preact's managed service continues to help us gain more value from Dynamics. This has included using some of our service hours to further extend the system by getting Preact to configure solutions such as ClickDimensions and our customer portal."

I regard Preact as the market leader for Microsoft Dynamics 365 and I'm very happy to recommend their services."

To learn more about DDC Dolphin, visit: www.ddcdolphin.co.uk