



Overview

Industry

Manufacturer of automatic washroom equipment.

Highlights

- Connected sales processes managed within Dynamics 365 to ensure leads are followed up and correctly qualified.
- Reduced reporting effort enabling several days to be saved each month.
- Increased Dynamics 365 product knowledge and insights gained through support, training and consultancy from Preact.
- Sustained performance gains with Dynamics 365.

Specialising in water saving technology for commercial washrooms, Dart Valley Systems has been producing automatic washroom technology for over 30 years.

As part of the Franke Group, Dart Valley is a market leader in the field of water saving products along with automatic washroom products for specialist applications, including healthcare, mental healthcare, custodial and retail markets.

Dart Valley Systems is a longstanding customer of Microsoft Dynamics 365, and we spoke to the CRM Administrator, Joanne Court about their experiences.

How important is Dynamics 365 to Dart Valley Systems?

It's hugely important, I've no idea what we'd do without it! When I joined the business 6-7 years ago, Dynamics was already in place, but we've moved it on to the extent that it's now our best system. I instantly fell in love with the system because everything was in one place.

In what ways is Dynamics supporting your sales team?

Dynamics 365 provides transparency that effectively enables us to track our sales performance.

Our team are well engaged with the software and are led by a National Sales Manager who is very enthusiastic towards CRM. We have Dynamics configured to fit our process which gives us all the information we need to target the right people. This has developed well, and the sales process now flows along nicely which helps everyone progress and qualify their leads.

Information is visible to everyone with a licence, and we can easily set tasks within the system to make sure things are followed up, without the need to send emails.

"Preact has helped with training and support which has enabled us to get CRM to a much better place.

I feel I'm always learning and it's exciting to discover new things which I can share with the rest of the team."

Joanne Court
CRM Administrator
Dart Valley Systems

How has Dynamics 365 improved reporting for Dart Valley?

It's allowed us to make significant savings in the time taken to produce reports, as well as providing greater detail to support group-wide reporting.

Each month we produce a sales activity report which is extracted from CRM. When I joined, this was eight slides, but it's expanded to over thirty. Despite the increase in content, less effort is now required to produce these reports because virtually all the information is populated from Dynamics 365. That's enabled me to reduce the time taken to compile each report from an entire week to within just a couple of days.

Can you tell us how Preact has supported your usage of Dynamics?

As the CRM administrator, Dynamics 365 is my main job so I'm always working in the system and updating things. The Preact team have been fantastic in jumping on any issues that we report. If anything needs tweaking, I know they'll be on to it.

I'll always call out if I don't understand something and ask for it to be explained in layman's terms if needed, but I've found all the guys at Preact helpful in breaking things down in a way that we can understand. They know I'm an administrator, not an IT developer!

How have you increased your knowledge of the system?

I was in at the deep end when I started because Dynamics 365 was new to me. Again, Preact has helped with training and support which has enabled us to get CRM to a much better place. I feel I'm always learning and it's exciting to discover new things which I can share with the rest of the team.

Many of the training sessions, newsletters and videos produced by Preact have opened our eyes and prompted us to follow up by asking more questions which has taken our knowledge to another level.

*"Preact have done a phenomenal job for us,
and they continue to look after us very well,
I can't fault them!"*

Joanne Court
CRM Administrator
Dart Valley Systems

In what other ways have your interactions with Preact helped you make improvements with Dynamics 365?

Within our managed service, Preact has highlighted where we can make improvements and their guidance has been important in steering some of the changes we've made. Sometimes it's small incremental changes, but it's allowed us to make huge progress and our team are enjoying using Dynamics.

Preact have done a phenomenal job for us, and they continue to look after us very well, I can't fault them!

What are you planning next?

We still aren't using Dynamics 365 to its fullest capacity, but we've made a lot of changes recently so for the moment we'll be working with what we have before planning our next series of updates.

Many thanks to Jo for her time and allowing us to share Dart Valley Systems story. To learn more about DVS and its water saving products and automatic washroom products, visit dartvalley.co.uk.

More information

To find out more about Preact and Microsoft Dynamics 365, visit www.preact.co.uk

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