

# Microsoft Dynamics 365 Case Study



## Overview

### Industry

Digital workplace membership organisation and consultancy.

### Business Situation

DWG wanted to connect its data and processes in the cloud, and provide a better user experience for its team.

### Solution

Microsoft Dynamics 365 Sales Professional.

### Benefits at a glance

- Transformed reporting enabling sales team to quickly act on insights
- More efficient handling of core processes
- Improved communication with easier mobile access to data
- Better experiences with existing apps including Yammer and Office 365 services by connecting to Dynamics 365

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Sarah Escott, Digital Workplace Manager, DWG

Digital Workplace Group (DWG) covers all aspects of the digital workplace industry through its membership, benchmarking and consultancy services.

The company’s activities include hosting a global community of practitioners, producing research reports, running member events and delivering projects to help organisations build better digital workplaces

With a team of more than 80 experts across Europe and North America, DWG offers expertise, community and insights to many of the world’s leading organisations.

### The Requirement

The company sought a new CRM solution to replace its legacy Act! system which lacked the functionality needed by DWG’s team. The company no longer has any physical offices so Act! had been installed on a remote server. This contributed to the difficulties encountered as Sarah Escott, Digital Workplace Manager and CRM lead at DWG explained.

“Logging in via a secure connection wasn’t a simple process and user attempts would often fall at the first hurdle. Act! wasn’t user-friendly and in our configuration, we weren’t able to link emails to records.”

The limitations of Act! had resulted in the creation of multiple spreadsheets and ungoverned data sources throughout the businesses. As a result, DWG lacked a central source of information across its processes, members and other contacts. The company sought a new cloud-based application to unify its data and provide a better user experience.”





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## The Solution

“The company quickly focused on Microsoft Dynamics 365 as we saw the potential to connect this with the Office 365 services that our team were already using.” says Sarah.

A solution had been identified, but DWG had yet to find a satisfactory implementation path. “We spoke to several providers, but we didn’t feel their approach was right for us.”, continues Sarah. “We were excited by what Dynamics 365 could do but the proposals we’d received involved more complexity and cost for the initial rollout than we believed were necessary. Eventually we engaged with Preact (now part of ANS Group) who advocated a more flexible plan that would quickly deliver a minimum viable product.”

Further savings were identified by equipping DWG’s team with Dynamics 365 Sales Professional and Team Member licences that adequately met its user needs. Implementation and training were undertaken as a fixed price package. Upon completion, the company has used their managed service for ongoing user support and gain access to technical consultancy and training.

## The Outcome

Within 12 months since its deployment of Dynamics 365, Sarah highlights how reporting has improved throughout the business.

“Virtually all of our reporting is now handled within Dynamics which is a world apart from where we were. The essential data is now available in one place which is far easier to access and share. For our sales team, it has meant they are able to use these live data feeds to focus more time on taking action or delegating tasks rather than administration.”

Sarah also points to wider benefits that have been gained by connecting Dynamics with its other applications and services.

“Yammer is widely used within our business and we’ve seen an added benefit in being able to improve internal communication by tagging Dynamics 365 records and people within these notes. This has proved especially useful to follow-up membership meetings and highlight the actions needed.”

### **Improvements in how DWG issues contracts and its execution of other processes have also been made.**

“The process flows in Dynamics 365 helped us critically look at our customer facing processes. Overall, these are now better streamlined. We have a clearer understanding of who is involved and what has happened which is rolled into our reporting.

The handling of our contracts is just one example of how we have been able to connect processes. Previously, winning an order and then sorting out a contract were two separate things, but these now flow through from one stage to another. For an individual member we can check their status at-a-glance, understand any orders that are in progress and what contracts are in place.

Also, we are starting to store our contracts in SharePoint. As these libraries are connected to Dynamics, we believe it will prove quicker to access these documents from account records.”





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Sarah Escott  
Digital Workplace Manager  
DWG

## **For more information**

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

Or, visit [www.preact.co.uk](http://www.preact.co.uk)

**By unifying its data, Sarah believes DWG is able to be more nimble.**

“We have been able to roll-out Dynamics to more of the team when previously only a few people had access to Act! CRM. Across the business, everyone is more responsive with better access to our data. For example, even in chance encounters with members we can quickly look up detail and have an informed conversation.

Having reliable mobile access to our data has been a big bonus. Before we only had a painful VPN link for PCs so removing this barrier and enabling access across all devices has proved significant for all the team, and our very mobile CEO.”

**Reflecting on DWG’s implementation of Dynamics 365, Sarah is pleased with the support received from their partner.**

“We’ve had an excellent experience with Preact, and I’ve found their consultants to be highly professional and patient. I’d definitely recommend their services to organisations that are looking to get started with Dynamics.”

User adoption was a critical factor in DWG’s success criteria and Sarah discusses some of challenges encountered, and how these were overcome.

“Our implementation was well handled by Preact and backed up by training. Early adoption of Dynamics 365 was encouraging, but this came to a halt as users were going back to spreadsheets. In my discussions with members of the team it was apparent that they didn’t consider the design of their reports to be effective.

My background is in communications and this experience proved useful in engaging users and responding to their concerns to keep the project on track. We collaborated to understand the design and formatting issues for each report. Appropriate changes were then applied to make sure these were relevant for each department. Once we were able to demonstrate these changes, everyone has been able to see the benefit. They are now fully on board and have a vested interest in making sure that data is kept up to date in Dynamics 365 to support their reporting.”

**Sarah sums up the progress that DWG has quickly made.**

“With Preact’s help, Microsoft Dynamics 365 has taken us to above and beyond what we expected in a very short space of time. We sought to implement a new system that would be better than Act! and within just a few weeks we’d progressed far beyond that point.

I believe we are well on our way to exceeding all our objectives and we are focusing on how Dynamics can be extended. In particular, we look forward to exploring its integration with Microsoft Teams and plan to implement Dynamics 365 Marketing with its event management module.”

Many thanks to Sarah and Digital Workplace Group for sharing their Dynamics 365 experiences. Visit [www.digitalworkplacegroup.com](http://www.digitalworkplacegroup.com) to learn more about its membership and consultancy services.