



***“Microsoft Dynamics 365 is proving to be a fantastic solution. It has fully justified our decision to implement the system and been instrumental in helping us transform our business during the last 12 months.*”**

Colin Smith
Sales & Marketing Manager, Drax UK

Overview

Industry

Fire protection technology and maintenance

Business Situation

Drax UK sought a new CRM system to support its growth plan that would centralise its customer data and improve process efficiency.

Solution

Microsoft Dynamics CRM deployed to 20 users and supported by a managed service agreement with Preact.

Main Benefits

- New insights from sales and other business data
- Greater clarity for informed decision making
- Increased mobility for sales users
- Centralised management of all sales processes
- Clear relationship view enabling targeted marketing messages
- Continued system improvements delivered through a managed service

THE COMPANY

Drax UK is an independent technology provider of integrated fire protection and alarm management solutions.

Through its services division, Drax undertakes maintenance for all types of fire detection and alarm systems and other specialist life safety systems for organisations operating in a wide range of sectors.

THE REQUIREMENT

The company had been using Act! CRM for many years but its team were finding the application restrictive as Colin Smith, the Sales and Marketing Manager at Drax UK explains:

“We have ambitious growth plans and the business had moved on from what Act! could deliver for us. In addition to Act!, we were relying on other data sources including a series of spread-sheets so there was a clear need to unify all our customer information in one place to better manage our processes.”

As part of our strategy to move the technology that we rely on into the cloud, we planned to implement Microsoft Office 365 so Dynamics 365 was seen as an ideal fit.”

THE SOLUTION

A defining factor in Drax UK’s project proved to be user adoption as Colin continues:

“Dynamics 365 is a much broader and sophisticated system compared to what we’d previously used. This presented a series of challenges to on-board our team and get everyone using the system.

Upon taking on the mantle for CRM, it was evident that the project was at risk because people had started drifting back to these legacy systems.”

“The implementation had perhaps been too ambitious which had created a disconnect with users who’d found the new system rather daunting in how it had been deployed. To get the project on track we needed to take a few steps back.”



“Preact have my recommendation because of the people we deal with. When I need to, I can always speak to our technical account manager who knows our system and understands our process. We can bounce ideas off him, discuss issues and get advice. This has proved invaluable in helping us determine further Dynamics 365 changes.

Colin Smith
Drax UK

Colin engaged with his team to identify their pain-points and worked with Preact to re-engineer some of the processes in Dynamics 365, change elements of the user interface and schedule additional training.

“The immediate need was to make Dynamics more accessible to the team and this was achieved by removing some of the complexity in the technology and building up their confidence.”, explains Colin.

“We then drip fed the functions and customisations that were switched off back into the system. Some 6 months later, the team was using largely what was originally rolled out but this was done in a controlled way with incremental changes that were easier for everyone to deal with.

Another important step was to make sure all of our data was moved into Dynamics 365 as this removed any option for reverting back to these legacy systems.”

THE RESULT

Colin highlights how Microsoft Dynamics 365 has enabled Drax UK to digitally transform its business:

“Everyone has now bought into the system. Whereas we previously handled our prospects, quotes and contacts in separate systems, everything is now centrally managed in Dynamics 365.

Very quickly this has given us greater visibility and clarity throughout the organisation. In particular, by connecting Power BI with Dynamics 365 we’ve transformed our reporting and decision making.

Previously, due to a lack of reliable information, we were forced to make decisions with a large degree of guesswork. Today, we have clear data for our sales opportunities, revenue figures and margins that we can confidently rely on. An example of this are time and labour allocations which enables us to identify any instances where we deliver more time than was billed, and understand why this happened.”

Microsoft cloud technology is helping Drax UK’s sales professionals operate more nimbly as Colin explains:

“Our sales team now have immediate access to all the information they need via their mobile devices which is stored in Dynamics 365, OneDrive or Sharepoint.

For example, wherever our people are I can have a timely commercial discussion with them about an individual opportunity and we can decide on a strategy. This might be to price a deal to win so following the conversation we can quickly finalize and send out the proposal.”



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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Drax UK's marketing team has also seen the benefits of an integrated system:

"Previously our marketing activities were not consistently focused but by aligning our email marketing and social engagements with Dynamics 365 we are now discovering new insights about our audience which is helping us segment our lists and better personalise our messages.

Microsoft Dynamics 365 is helping us understand our contact interactions wherever they occur.

A further benefit has been seen by connecting Dynamics 365 to our VOIP solution which enables everyone to click-to-call directly from a record and capture the call details."

Summing up, Colin is delighted with the progress that Drax UK has made:

Dynamics 365 is proving to be a fantastic solution. It has fully justified our decision to implement the system and has been instrumental in helping us transform our business during the last 12 months.

We are reporting on data we've never previously had, and having information readily available Dynamics 365 has greatly improved communication between our departments.

Colin highlights the support that Drax UK has received from its Dynamics 365 partner:

"Preact have my recommendation because of the people we deal with. When I need to, I can always speak to our technical account manager who knows our system and understands our process. We can quickly schedule calls where I can bounce ideas off him, discuss issues and get his advice. This has proved invaluable in helping us determine further Dynamics 365 changes.

The Preact helpdesk team have always been responsive in helping us resolve issues and give us service with a smile.

We are well versed with managed service agreements in our business and the facility we have with Preact has definitely helped to develop our Dynamics 365 system.

The pace of progress we've made has seen Dynamics evolve far more rapidly than I thought possible. This has prompted more departments to get involved in the project and push for more changes. Our managed service contract means these requests can be quickly turned around with Preact's help.

There is much more to come and we are in process of moving the management of our project tasks to Dynamics 365."

To learn more about Drax UK, visit www.draxuk.com