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An effective partner must understand both the technology and how the customer's business works and Preact has consistently demonstrated this.”

John Bancroft
Managing Director, Incognate Limited

Overview

Industry

Marketing agency

Business Situation

Incognate had suffered a poor experience with Microsoft Dynamics CRM following a failed implementation.

Solution

The company engaged with Preact and used its managed service to resolve outstanding issues and improve its internal CRM skills and expertise.

Main Benefits

- Clear visibility across critical business processes
- Improved project management and invoicing processes
- CRM data-driven planning and decision marketing
- Increased internal CRM administration skills

THE COMPANY

Incognate Limited is a well-established creative marketing agency, based in Oxfordshire.

The company specialises in creative B2B content marketing and design to support its clients through proposal writing, collateral creation, sales presentations, blogging and additional services.

THE REQUIREMENT

Incognate did not previously have a unified CRM system and its Managing Director, John Bancroft explains how gaps were evident in their processes:

“We had a several unconnected systems and without having a real-time picture of where we stood it meant we were lacking clarity to understand when our projects needed to be invoiced.

Too much of our time was being consumed in having offline conversations to fill in these gaps as our team sought to understand what work had been completed, and confirm when an invoice could be issued.

We were also concerned about the risk of critical information slipping through the net as well as further time that was being spent logging into as many as four different systems.

Overall the situation was very fragmented and heavily reliant on manual processes.

Our team work in many locations across the UK so communication and shared information is crucial for us.”

Incognate was born in the cloud and the company has used Microsoft cloud services for some 10 years so Microsoft Dynamics CRM (now Dynamics 365) was an obvious fit as John highlights:

“Our goal was to reduce processing time and costs. We saw that Microsoft Dynamics included all functions we needed to bring our people together and make our processes run more efficiently.

We were very excited by the prospect of getting started with Dynamics CRM and we met with our IT partner to plan the implementation.”



“We know we can lean on Preact whenever we need help with Microsoft Dynamics.

As part of our CRM managed service, we have access to a technical account manager who is very proactive offering suggestions for how time can be best used to improve our system.”

John Bancroft
Managing Director
Incognate

“Unfortunately, this did not prove successful and we suffered a poor experience.

It became clear that our partner lacked CRM expertise and the system we were given fell a long way short of what we expected.

This contained too many unnecessary fields and several of the workflows that we needed weren't configured to run automatically.

At this point, we lost some heart and although we persisted with the system we were just muddling through with Microsoft Dynamics by only using the basics.

However, I still believed Dynamics CRM was the right choice and we'd partnered with the wrong company.

I spoke with Microsoft who recommended that we engage with a CRM Gold partner in our area.

Following this I found Preact's website on Google.

Their content immediately resonated and seemed to cover everything that we needed, it appeared to be written exactly for someone in our circumstances!

From the outset I had a very positive discussion with Preact and following this I signed up for its managed service to help us get the project on track.”

THE RESULTS

Preact began by carrying out a discovery session to review Incognate's Dynamics CRM system:

“Working with Preact's consultant, we walked through what had been implemented to determine what had been set-up correctly, and what issues needed to be resolved, which gave us a blue print for achieving some quick wins.

This approach gave us renewed confidence in Dynamics and it established that Preact would be able to help us move forward.”

Once these changes were applied, John reports that a quick turnaround in CRM performance was seen:

“With Preact's help we uncluttered many of the CRM forms and created new personalised views within the system which improved the user experience for our team who are now engaging with the system.

Our processes now operate far more smoothly as our workflows are connected and correctly configured.”

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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"This includes dynamic fields with supporting automated workflows that alert us when a project is finalised, and when we need to issue an invoice.

We also have automated processes that push out notifications highlighting tasks that need to be completed before a project can be finalised.

For example, if we haven't received a completed commercial agreement a project is at risk so these CRM processes provide an effective safeguard for us.

The training and input we've received from Preact has given us a better understanding of how Dynamics works under the hood.

This has improved our admin expertise and we are more informed when we're considering making changes to the system."

John also highlights the reporting improvements that Incognate has seen:

"We now have excellent visibility of our data from sales through to project delivery.

We can see what is coming through in terms of project deliverables and anticipate when we will invoice.

This means we can look ahead to see if we are on course to hit our revenue targets which gives us greater certainty for what we will be invoicing and the margins involved.

The clarity that we now have with Microsoft Dynamics CRM has made a big contribution to improve our planning and the management of our projects."

Summing up, John credits the support that Incognate has received from its partner in helping them turnaround this project:

"The journey we have been on with Preact has been great.

Their support has been spot-on, they have always answered our CRM questions quickly and resolved any issues very professionally.

I'm a firm believer that an effective partner must understand both the technology and how the customer's business works and Preact has consistently demonstrated this.

We know we can lean on them whenever we need help.

As part of our CRM managed service, we have access to a technical account manager who is very proactive in sharing activity reports and offering suggestions for how time can be best used to improve our system.

We are looking forward to the prospect of making continued progress with Preact's support!"

To learn more about Incognate, visit www.incognate.com