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Sebastian Stungo
In Communication Limited

Overview

Industry

Conference for corporate communications

Business Situation

Incomm sought a new partner to help them turn around their CRM project following an initial implementation which had failed to deliver the expected results.

Solution

Preact managed service for Microsoft Dynamics CRM / 365.

Main Benefits

- Accurate real-time reporting of service level agreements and other performance indicators
- Increased productivity by removing manual reporting steps
- Easy access to CRM support, mentoring and advice
- Increased user engagement

THE COMPANY

In Communication Limited (Incomm) provides bespoke conferencing services to manage high profile, mission critical conference calls for their clients corporate and internal communications.

Working with some of the world’s leading organisations, Incomm solutions support conferencing calls for media and investor relations, town hall and client events that are adapted to fit each unique requirement.

BACKGROUND

The company had deployed Microsoft Dynamics CRM / 365 with the assistance of its businesses partner but this had not achieved the expected results.

Sebastian Stungo, responsible for managing Incomm’s Microsoft Dynamics database explains:

“The first phase of our Microsoft Dynamics rollout proved to be a one-size-fits-all implementation but because we have some highly bespoke processes this approach meant these weren’t being managed effectively within CRM.

For example, our coordinator team need to react quickly when we receive new instructions and enquiries for conferencing events.

The team must acknowledge and complete these activities in line with our service level agreements but in the initial implementation these weren’t being accurately measured in Dynamics.

This compromised our SLA monitoring and meant that time was being wasted by manually checking and reporting on this data each day.”



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Sebastian Stungo
Incomm

THE RESULT

Incomm engaged with Preact to help them develop and personalise their Dynamics system as Seb continues:

“From the outset we were impressed by Preact’s interest in our business and their commitment to understand our processes.

Improving the monitoring of our service level agreements was an immediate priority.

Preact identified and implemented a series of solutions that now manage these performance indicators as we require. One of our SLA’s defines the maximum time limit between receipt of an email enquiry and our first response.

Previously, the Dynamics SLA start-time would commence based on the time that the email was tracked in CRM as a case. Preact corrected this by using the email date and time which now gives us meaningful data that we can use to measure and report.

In another instance, SLA improvements were made by adjusting the data that is used to monitor the actual start time of an event, rather than the scheduled time.”

Following its initial implementation of Microsoft Dynamics CRM, Incomm found that its team were frustrated by the user experience:

“It was clear that they didn’t like Microsoft Dynamics at that time”, says Seb. “Our team were having to use Dynamics, rather than wanting to.

This was a direct result of the implementation approach that had been followed. The record forms we were using for cases, contacts and other entities were a prime example of this. These featured too many out-of-the-box fields and functions that we didn’t need which created unnecessary complexity for users.

I worked with the team to streamline these form layouts by removing fields and other elements that weren’t needed and with Preact’s help we’ve made these easier to use. This has gone a long way to improve the user experience and build their confidence in the application.

Seb highlights further examples of how Preact has quickly helped Incomm gain increased value from Microsoft Dynamics:

“One of the sessions we scheduled focused on cleansing CRM data and this proved extremely beneficial as Preact were able to identify and remove a lot of data that we didn’t need which enabled us to reduce our monthly cloud storage costs.



"We also worked with Preact to apply a consistent naming convention across our CRM fields which has made a big difference to our reporting capability.

The main impact of this is that's we're now able to dynamically show real-time performance on a big screen in the office using our CRM data. This flashes up our key metrics to show us what is successful and highlight any areas for attention.

It means our performance data is highly visible and it underlines the progress that Microsoft Dynamics has helped us make.

Previously, we would manually compile performance reports across the team. Now that we have accurate data reported in real-time, Microsoft Dynamics has enabled us to collectively save in excess of 30 hours each week."

Incomm use Preact's managed support service for Microsoft Dynamics CRM / 365 and Seb explains how this is helping the company make continued improvements to their system:

"We have the option to speak to Microsoft for Dynamics support but Preact make a big difference by having a working knowledge of our system and our business processes.

I've found their team to be informal and friendly and they've always demonstrated a willingness to go the extra mile and understand our business. I'm able to speak to our CRM technical account manager when we need advice or to discuss new requirements, and during our on-site sessions we always cover a lot of ground.

We closely follow Microsoft's updates to identify how we can benefit from the new releases and our managed agreement means that we have convenient way to discuss and configure the latest improvements."

Summing up, Seb is satisfied with the progress that has been achieved:

"We are very happy with the results that we are now seeing from Microsoft Dynamics. It has transformed our reporting capability and greatly increased efficiency throughout the business.

Preact's assistance has been instrumental in helping us get this project on track and we are delighted with the progress we've made."

To learn more about Incomm, visit www.incommglobal.com

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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