



## Overview

### Industry

Intelligence and information services

### Business Situation

Intelligence Research required a refresh of their Dynamics 365 system to ensure all their main processes can be managed in Dynamics.

### Highlights

- Having data stored in the cloud, that is backed up daily, gives confidence it is protected
- Can now use data to quickly launch remarketing campaigns for prospects who have previously enquired
- Centralised data allows users to access and report on information whenever they need to
- Found the Preact team to be professional, and quick to resolve support cases

## INTELLIGENCE | RESEARCH

### Intelligence Research is an intelligence and information company specialising in Latin America and the Caribbean.

The company's corporate intelligence division draws on more than 50 years of experience in Latin America and the Caribbean, and its network of correspondents and sources, to provide bespoke intelligence services. Its news and analysis division, LatinNews was founded in London in 1967 to provide expert political, economic and security analysis across Latin America and the Caribbean.

Following its successful relaunch of Microsoft Dynamics 365, we spoke to Patrick de Courcy, Director of Corporate Intelligence at Intelligence Research.

### How important is Dynamics 365 to Intelligence Research?

It's now our number one system. We started out a while back, but with a fresh approach and Preact's support we've now got the system to where we need it to be. All our main processes, including customer subscriptions and sales leads, are managed in Microsoft Dynamics 365.

With our data stored in the cloud, we have confidence this is protected and being backed up daily, so we can always restore to an earlier point in case of need.

*"It's now our number one system. We started out a while back, but with a fresh approach and Preact's support we've now got the system to where we need it to be."*

Patrick de Courcy

Director of Corporate Intelligence

Intelligence Research

## **How is Dynamics 365 helping Intelligence Research improve the management of its subscriptions?**

Each subscription enquiry coming into the business is tracked in Dynamics, so we can see what's on the go at any time and check which contacts we need to be in touch with. The historical record of these interactions also allows us to easily run follow up marketing campaigns. For example, we're able to use this data to quickly launch remarketing campaigns that promote trial subscriptions to contacts who've previously enquired.

A record of each subscription is stored in Dynamics which keeps our notes and expiry dates accessible in one place. Using dynamic list views, we can instantly see which subscriptions are expiring in the next couple of months. This would be incredibly laborious to manage using Excel spreadsheets, but Dynamics 365 has made life easier, and it continues to save us time.

## **What other key processes does Dynamics manage?**

As our routine transactions are saved in Dynamics 365, we are also using this data to produce deferred income reports which supports our accounts reporting and payment reconciliation. Having all this data centralised allows us to access and report this information whenever we need to.

## **How has Preact supported Intelligence Research's usage of Dynamics 365?**

The help and support we've received from Preact has been very good, though we haven't had many CRM issues to report. When we have needed assistance, I've always found the Preact team to be professional, and these cases have been swiftly resolved. I'm happy with the service we've received and would be happy to recommend Preact's services.

## **What are your plans for Dynamics?**

One of the items on our roadmap is to develop our usage of Dynamics 365 sales pipeline capabilities, as we look to evolve our workflows and make these more sophisticated.

***We are grateful to Patrick for sharing his feedback. To learn more about the services provided by Intelligence Research visit, [www.intelligenceresearch.com](http://www.intelligenceresearch.com).***

## **More information**

To find out more about Preact and Microsoft Dynamics 365, visit [www.preact.co.uk](http://www.preact.co.uk)

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