



interaction

Overview

Industry

Workplace design and fit out

Business Situation

Interaction set out to implement a centralised CRM system that improved data capture and increased visibility across the organisation

Highlights

- Configured various automated processes to reduce burden on the team
- Improved handling of client queries and issues
- Gained useful insights to optimise email marketing communications
- Quickly deployed Dynamics 365 with project management from Preact
- Improved internal communication, especially during meetings

Interaction are workplace design and fit-out experts. Since 1992, the company has been meeting the needs and aspirations of its clients by creating unique workplaces that enhance an organisation's culture, values and employee wellbeing.

Following, its deployment of Microsoft Dynamics 365, we spoke to Interaction's Business Systems Manager, Mike Borne and Head of Marketing, Toby Brown.

Why did Interaction look to implement a new CRM system?

Our business development team were using Insightly to manage our accounts, contacts, leads and opportunities. This was ok for what we originally needed but the system was siloed and only accessible for a few people. Insightly was a simple application that collected basic data, but many other activities weren't being captured.

Within our customer care team, a master client spreadsheet was being updated but we lacked a central CRM system that would connect marketing, sales and resourcing.

What were your main objectives for a new solution?

We wanted to see at-a-glance what is going on across all areas of the business and ensure data consistency. With different systems and spreadsheets in use, there was too much variation in how data was captured. This also meant that no one person had visibility of everything, and ownership was hard to define.

Reporting was a manual process which involved copying data to spreadsheets and producing charts. This was resource intensive, and the resulting quality wasn't high.



"The system doesn't present barriers and it enables our team to do their job better."

Using the Dynamics 365 Sales Hub, we've achieved greater consistency in how we capture data across a project lifecycle, including the initial stages from lead to opportunity."

Mike Borne

Business Systems Manager

Interaction

Why did Interaction choose Dynamics 365?

We looked at various products including HubSpot and Salesforce, as well as Dynamics. Overall, their functions seemed broadly similar, but we were impressed by the Power Platform that Dynamics 365 is built on. We bought into its integration with other applications and Power BI, that would natively give us a centralised solution. We saw the potential to build further connected apps that could enhance our processes, which seemed flexible enough for us to work on.

How did Interaction select Preact as its implementation partner?

We knew Preact had experience in our industry and the type of clients that we work with. Their name regularly came up as a recommended supplier when we were researching potential partners.

How is Dynamics 365 meeting your requirements?

Overall, we've found it easy to use. The system doesn't present barriers and it enables our team to do their job better. We've configured various automated processes which reduce the burden on people. One example is automated lead scoring which ranks leads based on our criteria which helps us allocate resources. Using the Dynamics 365 Sales Hub, we've achieved greater consistency in how we capture data across a project lifecycle, including the initial stages from lead to opportunity.

Can you tell us more about the improvements Dynamics has made to your service processes?

Improving how we handle client queries and issues was another priority. When we were using a master spreadsheet, it was difficult to understand the status of individual cases. Excel is a great tool, but it isn't suited for this type of data, and we'd completely outgrown it.

Through Dynamics 365 Customer Service, we now see examples of good data going into quality outputs for the business and our clients. It's early days, but we are already seeing the benefits of better visibility and we've also integrated case logging with our website. Previously, issues could be flagged with our project managers, but they aren't always best placed to deal with follow-up items so it's a big win that issues are now going straight into Dynamics 365.





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Toby Brown
Head of Marketing
Interaction

How has Dynamics 365 helped Interaction improve its reporting?

In the Sales Hub, we've built a series of goals for our projects and lead values which means we can log in and instantly see where we're at. This has proved to be a big transformation. Previously, this was a manual process that took someone days to collate and produce a report, but now we're able to quickly determine actions with complete data rather than making our best guess.

What additional insights have you gained using Power BI?

Our Power BI dashboards are providing a clear flow of data throughout the business. Within marketing, this helps us understand what's on the horizon and what collateral might be needed. We've also gained some useful insights which have enabled us to optimise the design of our email newsletters and increase our click-through-rates by understanding which approaches have worked best and who has engaged.

In what other ways has Interaction been able to leverage the Power Platform?

We've also deployed a Power App which presents details of our active jobs. Using the customer data that we capture in Dynamics 365 we've been able to turn the numbers into a Gantt chart via Power Apps. These visualisations are easier for us to consume and interact with, and any updates only need to be applied once. It's another example of how we've been able to replace an unwieldy spreadsheet and remove duplicated data entry. The app was straightforward to build, taking only a few days to complete the initial version, and it has since evolved and expanded.

How effectively has Preact supported your Dynamics 365 deployment?

Our project was well handled by Preact. We provided clear information on what we wanted, and their team delivered. In particular, the quality of their project management was very good. The team were helpful throughout and kept on top of the various tasks.

Following our initial deployment, we've used Preact's managed service to answer user questions. The managed service has also been useful in enabling us to schedule follow-up training and consultancy sessions, and to address new requirements.



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Using a live platform which everyone can access has been a game changer for us."

Mike Borne
Business Systems Manager
Interaction

How do you assess the progress that Interaction has made with Dynamics 365?

It's enabled us to improve our communications, especially within our internal meetings. Our business development team can conduct meetings more easily because their data covering leads and appointments is readily accessible. It is a similar situation in our resource team meetings as the same data is used.

We've been able to leave behind our legacy spreadsheets and standalone apps with everyone coming together on a central system. Using a live platform which everyone can access has been a game changer for us.

What are you planning next?

Dynamics 365 Marketing and Power BI both have a lot of potential, so we are looking forward to expanding our usage. We are also planning to implement Dynamics 365 Business Central and connect this to our other applications. Finally, we are continuing to look at more opportunities for process automation, where we can, that will remove duplication of effort.

We are grateful to Mike and Toby for sharing their experiences of Dynamics 365 and the Microsoft Power Platform. To find out more about Interaction and its award-winning office design and fit-out services visit, www.interaction.uk.com.

More information

To find out more about Preact and Microsoft Dynamics 365, visit www.preact.co.uk

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