



A Sysmex Group Company

Overview

Industry

Molecular genetics research

Business Situation

OGT sought a centralised solution that would connect its data and unify processes across its business units.

Solution

Microsoft Dynamics 365 for Sales with Managed Service.

Main Benefits

- Consistent handling of sales processes
- Improved communication between sales and marketing teams
- Visibility of client interactions across multiple touch points including sales, marketing and service
- Clearer insight of active deals and more accurate forecasting
- Clarity of marketing ROI
- Improved data quality

“It’s especially satisfying to see that the relationship between our sales and marketing teams is much closer since implementing Microsoft Dynamics 365.”

Timothy Sowa, Digital Marketing Manager, OGT

Oxford Gene Technology (OGT) provides world-class genetics research solutions to leading clinical and academic research institutions.

Across its teams, OGT was using a combination of unconnected systems including Act! CRM and Excel spreadsheets. As a result, islands of data were evident as Timothy Sowa, Digital Marketing Manager at OGT, explains.

“Act! was being used as a glorified address book and it was clear that we need something more sophisticated to handle our processes. We also wanted a new system to help us better align our sales and marketing teams.”

Centralising the management of its data and defining a single mode of operation for its processes across all business units was another priority requirement for OGT.

The company selected Microsoft Dynamics 365 and instructed its partner, Preact to implement the new solution. This quickly improved the handling of its sales opportunities as Timothy highlights.

“Previously, we did not have a central system for our Sales teams to log and share their managed opportunities. It was all done in Excel reports. As these are now being tracked in Dynamics there is greater continuity if someone new needs to pick up an opportunity. This includes being able to refer to past communications on some of our longer-term pipeline deals.”



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Timothy continues, “With Preact's help we've made a series of changes to the handling of these opportunities in Dynamics. Initially the system was set up to handle sales that would close within a few months but many of our opportunities can last over a year or more.

We've now developed an additional sales process which provides extra flexibility to handle these scenarios. Through further improvements we've simplified the entry of this data which has been well-received by our users.

Another challenge was to unify sales processes across our European and North American businesses. These have now been adapted and are managed consistently within Dynamics 365.

Sales Managers also have a better grasp of where their teams are with their active opportunities by using the sales funnel and other reports for real-time analysis. This is providing better visibility on which deals are most likely to close and it means that the system just needs to be kept up-to-date”

Dynamics 365 has also been deployed to OGT's Field Applications Specialists (FAS) team that uses the system to track cases.

“FAS are often involved in the sales process by providing support and undertaking validations so it's useful to have their activity aligned to accounts and sales opportunities in Dynamics 365.”

On the marketing side, Timothy points to a series of improvements.

“With Dynamics and ClickDimensions in place we are able to profile our contacts with greater accuracy and send targeted emails. Also, by understanding who isn't responding to our messages we are able to run reactivation campaigns. As well as prompting new engagements this is helping us maintain data quality and cleanse our marketing lists by removing unresponsive contacts.

We use ClickDimensions to track our opt-in emails which has proved crucial in enabling us to demonstrate GDPR compliance. Also, we've been able to sharpen the appearance of our emails using its designer.”



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“Preact’s managed service has proved very useful by quickly carrying out tweaks and other developments. These have made incremental improvements to our system and I’ve found their team very responsive to our requirements.”

Timothy Sowa
Digital Marketing Manager
OGT

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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Summing up, Timothy says Dynamics 365 has enabled OGT to save time and improve communication between its teams.

"It's especially satisfying to see that the relationship between our sales and marketing teams is much closer since implementing Dynamics 365. We have a smoother handover of leads from our tradeshows, email campaigns, web leads and other marketing activity because all the key information is effectively tracked.

This has created greater transparency as sales and other areas of the business can see clearer evidence of the return from our marketing activities. It can be easy to lose track of this but with the essential data in one place we are better able to demonstrate a quantifiable return of opportunities from any activity including our events and campaigns.

Timothy acknowledges the support that OGT has received from its partner.

"Preact's managed service has proved very useful by quickly carrying out tweaks and other developments. These have made incremental improvements to our system and I've found their team very responsive to our requirements.

We've recently worked with them to switch over to the new unified interface which has enabled us to improve the user experience. For example, Preact has embedded a new Power App quote accelerator that makes it easier for the sales team to quickly add multiple products when building their large quotes, which can sometimes be more than 50 products.

The tabbed structure of the new interface has proved easier to navigate as it involves less scrolling. Since we switched to the new interface, our teams have reported faster page loading and better Dynamics performance.

I've found Preact great to work with. They've been flexible in supporting our users across different time zones by taking calls late in the day and their development work has always been implemented smoothly. We've received a personal service and I believe they've consistently demonstrated a good understanding of our business.

Looking ahead, we are eager to make further improvements with their help that will include Power BI and Power Apps."

We thank Timothy and Oxford Gene Technology for sharing their experiences. To learn more about their work, visit: www.ogt.com.