

## SOURCE TELECOM

### Overview

#### Industry

Telecommunications

#### Business Situation

Source Telecom sought a new CRM partner to help them transform the efficiency of its business processes by developing their Microsoft Dynamics system.

#### Solution

Microsoft Dynamics 365 is now deployed to 10 users who are supported by Preact.

#### Main Benefits

- Fully connected processing from sales lead to order
- Improved data quality and process consistency through guided CRM workflows
- New actionable insights gained from CRM data
- Removed duplication of effort with CRM and Sage 50 integration
- Improved nurturing of prospects through integrated email campaigns

*“Compared to our previous supplier, Preact has been far more responsive and demonstrated a ‘can-do’ approach.*

*Our discussions are always consultative which has helped us understand just how much is possible in Microsoft Dynamics.”*

Laura Fowler, Business Account Manager  
Source Telecom

### Background

Source Telecom is an independent broker of telecommunications solutions for businesses of all sizes.

Based in Falkirk, the company provides a single point of contact for mobile, voice, data and networking needs.

By providing impartial advice, Source Telecom helps organisations select the best telecoms provider from its extensive network of partners. The company’s services include bill monitoring and tariff reviews to identify where savings can be made.

### The Requirement

Source Telecom had previously implemented Microsoft Dynamics CRM but the system was not customised and consequently it wasn’t widely adopted by their team.

As Business Account Manager, Laura Fowler joined Source Telecom in 2015. With recent experience of using Salesforce, Laura saw the significant potential that CRM offered to improve the efficiency of the business.

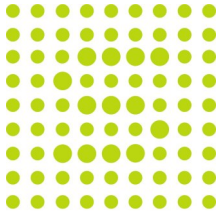
A series of changes to their Microsoft Dynamics configuration were requested but the company was frustrated at the lack of progress and guidance from its incumbent supplier. As a result, a more proactive CRM provider was sought.

### The Solution

Source Telecom chose Preact as its new CRM partner and Laura quickly found this relationship to be a significantly better fit:

*“At the outset, our management team met with Preact to share our plans for Microsoft Dynamics and agree an action plan. This was a good forum in which we could share the CRM challenges we’d experienced, and tell them what we wanted to achieve.*

*We were encouraged by the experience that Preact contributed to these initial conversations which did a lot to shape our CRM strategy and it helped us to agree on the immediate work to be carried out.”*



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***“With opportunity and appointment data held in Microsoft Dynamics we can quickly report on this.*”**

***It’s just one of the ways that CRM data is now driving decisions in the business, and how it has helped us save a lot of time.”***

Laura Fowler  
Business Account Manager  
Source Telecom

Laura continues, *“One of the most important improvements that we wanted was to join up our processes from receiving an initial lead through to order processing. These were reliant on manual intervention which made them liable to failure at various points.*

*Today, the entire process is handled within Microsoft Dynamics which is a complete transformation from where we started!”*

When new leads are added to Microsoft Dynamics, Source Telecom’s users are prompted to follow a series of guided steps that help them qualify these prospects as Laura explains:

*“The Microsoft Dynamics process bar gives us a very clear structure to follow and the mandatory questions it includes helps our sales team progress these workflows. In doing this CRM has improved the quality of data that we capture and this flows through when our leads are qualified.”*

Upon completing an opportunity Source Telecom send a confirmation email to its customers. Previously, this was a manual process but as Laura highlights this is now fully automated:

*“When an opportunity is won we email the customer confirmation of their appointment. This is now sent as part of an automatic CRM workflow which uses one of our Click Dimensions email templates. The message details the appointment and having this email automatically sent has been another major time saver for us.*

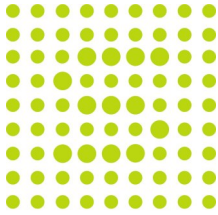
*This is an important process because our sales team is targeted on how many appointments are fulfilled. With opportunity and appointment data held in Microsoft Dynamics we can quickly report on this, and in instances where appointments are cancelled, or need to be rescheduled these tasks are easily routed back to sales users.*

*This is just one of the ways that CRM data is now driving decisions in the business, and how it has helped us save a lot of time.”*

Connecting Microsoft Dynamics CRM with its Sage 50 accounting system is another example of the time saving efficiencies that Source Telecom has achieved:

*“Previously we used to enter invoice detail in both CRM and Sage 50” continues Laura, “but with these two systems now integrated our invoices are automatically generated through Sage using the data we input into CRM. This has removed a hugely frustrating manual task and we are delighted that these invoices are now raised completely automatically!*

*By linking CRM with Sage we are also now able to accurately report on the actual profit made. Previously, this was recorded on spreadsheets and there was potential for errors or inconsistent approaches. Microsoft Dynamics CRM has streamlined this and ensures everyone is working the same way.”*



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***“From my experience, Microsoft Dynamics is a highly impressive and I’ve found it notably more flexible for users in comparison to Salesforce.***

***With all our main data now available in CRM we are much better informed thanks to its reporting and forecasting tools.”***

Laura Fowler  
Business Account Manager  
Source Telecom

Click Dimensions is also used by Source Telecom to carry out its email marketing:

*“As a well as sending email newsletters and reporting on open and click actions we use Click Dimensions to run a series of nurture campaigns”, explains Laura.*

*“When we speak to people who aren’t yet ready to engage us we can move them into a nurture campaign. This will send a series of emails over several weeks or months and with its reporting we can identify when people are responsive to these messages.”*

### **The Result**

In conclusion, Laura is delighted with the progress that Source Telecom has achieved:

*“From my experience, Microsoft Dynamics is a highly impressive and I’ve found it notably more flexible for users in comparison to Salesforce. With all our main data now available in CRM we are much better informed thanks to its reporting and forecasting tools.”*

Laura says their CRM partner has been instrumental in helping Source Telecom achieve these successes through Microsoft Dynamics:

*“Compared to our previous supplier, Preact has been far more responsive and demonstrated a ‘can-do’ approach whenever we’ve asked for changes to be made to the system. Our discussions are always consultative which has helped us understand just how much is possible in Dynamics.*

*We have a managed service agreement which means there is always someone we can speak to whenever we have CRM questions, and we are able to schedule time when we want to make changes to improve the system.*

*Preact’s approach and advice helps us make best use of our managed service and it’s enabled us to determine the best solution for making continual improvements to CRM.*

*We are proud of what we’ve accomplished in Microsoft Dynamics and there have been several instances where we’ve demonstrated our CRM system to other companies and we strongly recommend Preact’s services.”*

## For more information

To find out more about Preact and Microsoft Dynamics please call 0800 381 1000 or +44(0)1628 661 810

Or, visit [www.preact.co.uk](http://www.preact.co.uk)

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## About Source Telecom

Source Telecom takes a fresh approach to managing telecoms needs.

Independent of all networks, their experienced team remain up-to-date with developments in the fast changing telecoms industry to save businesses money and provide impartial advice.

Source Telecom is a Scottish company with in-house teams offering unrivalled customer service and technical support.

[www.sourcetelecom.co.uk](http://www.sourcetelecom.co.uk)

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## About Preact

As award-winning CRM architects, Preact have been helping all types and sizes of businesses achieve success from their CRM strategy since 1993.

At the heart of Preact's culture sit our core values, Putting Customers First, Being the Best and Building Business Together.

We are committed to helping organisations achieve outstanding from their CRM solution whilst giving excellent value for money.

[www.preact.co.uk](http://www.preact.co.uk)

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