

GUIDE

Innovate and thrive with ANS and Microsoft Dynamics 365.



ANS

Think Bigger.



Overcome Challenges

Discover new opportunities.

With change comes processes to plan, security risks, and more data to manage.

But how do you make sure your processes are scalable and robust? Ensure that your organisation is protected? And empower your workforce to make informed, data-driven decisions?

In this guide, you'll see examples of how organisations of all sizes are using Microsoft Dynamics 365 to introduce capabilities that help their teams innovate and thrive.

Microsoft Dynamics 365 connected apps work on the same cloud platform which includes Power BI, Power Apps and Power Automate to analyse, act and automate.

With Dynamics 365, follow five steps to increase your agility and efficiency



Connect, unify and protect your data



Empower data-driven insights



Accelerate results with efficient, automated processes



Personalise messages, and align sales and marketing



Create greater value to exceed expectations

01. Connect, unify and protect your data

Connect your data with Dynamics 365.

Ensure your data is always secure, yet always accessible to your team, wherever they work.

Dynamics 365 goes beyond traditional CRM to provide a comprehensive solution that connects your entire business.

It includes all of the standard MS plus

- ✓ **Replace spreadsheets and legacy systems** with a single platform that unifies data across CRM, marketing, ERP and more.
- ✓ **Centralise your data to work seamlessly.** Data across Dynamics 365 and Microsoft 365 productivity apps including Outlook, SharePoint and Teams is stored in the Power Platform. This makes it easier to move faster by surfacing CRM data between devices and apps.
- ✓ **Consistent user experiences.** Regardless of the app or device, everyone has access to the same functionality within a unified interface.
- ✓ **Keep on top of data protection** through a single admin centre to manage all Microsoft business applications, environments and workflows.
- ✓ **Increase engagement with prospects and contacts.** Send personalised messages in real-time when key interactions and events occur by using data triggers across Dynamics 365 apps.

01. Connect, unify and protect your data

How we Improved our data management.

Who?

DDC Dolphin, infection control experts.



Why?

The company's previous CRM couldn't handle its service processes. Also, its data was disconnected, resulting in a lot of effort to compile reports.

The results?

DDC Dolphin has reduced the time it spends on creating reports. And it's brought all its data into one place.



“Throughout the business we now find it much easier to work with our data through views and filters in Dynamics 365, which enable everyone to get the information they need. Reporting is now a million times better than before and we can always dig deeper for more insights.”

- Operations Director, DDC Dolphin

01. Connect, unify and protect your data

Meet your unique requirements

Reinvent your manual processes to make productivity gains. Go paperless, or simplify repeatable workflows using connected mobile apps and solutions built on the Microsoft Power Platform to handle specific workloads.

All data is stored centrally in Dynamics 365 to automate processes, improve reporting quality and ensure accessibility.

Increase collaboration

Help your people collaborate better than ever. Link opportunities, projects, accounts and other Dynamics 365 records to Microsoft Teams. Use inbuilt chat and collaboration capabilities to rapidly drive decision-making. Invite anyone to participate - they don't even need to be a Dynamics 365 user!

Single source of customer information

From an initial sale, to ongoing customer support and marketing communications, access to complete information in one place allows everyone to stay up-to-date and make well-informed decisions.



02. Empower data-driven insights

How to uncover new insights with Dynamics 365.

Turn your data into results

When your data is connected, you have a single source of truth to gain critical insights. Not only does connected data provide accurate reporting, it also accelerates the speed of decision-making. With Dynamics 365, you have the access and automation to drive informed decisions throughout your organisation, without having to spend significant time extracting and collating data.

- ✓ **Track the metrics that matter to you.** Dynamics 365 provides real-time reporting across your key business processes so you can keep on top of the performance indicators that matter most.
- ✓ **Increase reaction times.** Develop a culture of proactive decision-making by relying on trusted CRM data to uncover actionable insights and quickly find answers to your questions.
- ✓ **Experience your data in new ways.** Dynamics 365 connects with Power BI to provide rich visualisations that help everyone identify trends and uncover actionable insights.
- ✓ **Prompt users with the next best actions.** Embedded intelligence and Microsoft Exchange provide sentiment analysis, suggest follow-up actions and trigger reminders.

02. Empower data-driven insights

How we transformed reporting and decision making.

Who?

Age UK Islington, is an independent charity providing support to people in the London Borough of Islington.



Why?

The organisation lacked internal analytics to adequately monitor its resources and demand for its services.

The results?

Dynamics has enabled Age UK Islington to revamp its management reporting by demonstrating the effective use of its resources and funds. These data insights are also helping the organisation to improve its local services.



“Our data is now providing us with a source of exploratory analytics to discover trends for what people in the community are looking for, and what problems are occurring.”

- CEO, Age UK Islington

02. Empower data-driven insights

Quicker, more informed insights

Insights across large data volumes allow teams to easily interpret results and short-cut the time to act. For example, scanning and tagging text tracked in support cases can highlight recurring issues and show which ones are taking the longest to resolve.

Query data for personalised results

You don't need to be a data scientist to extract the information you need! Sort through data with intuitive querying functionality whether you're dealing with wildcard queries or a more complex query across multiple tables.

Predict what's going to happen

Understand the health of your business to make educated strategic decisions. Analyse trends and plan for the future using in-built Dynamics functionality, including Sales Forecasting, Predictive Lead Scoring and Conversational Intelligence.

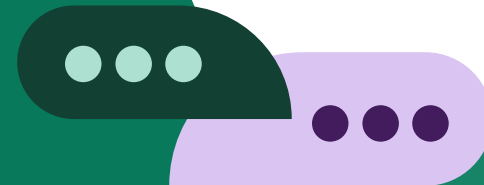


“ANS has introduced Power BI which is improving the quality of our forecasting. This makes it easier to conduct regional analysis and forward planning to understand what quantity of components need to be stocked based on projected orders.”

- Global Sales Systems Manager, Socket Mobile

The logo for Socket Mobile, featuring the word "socket" in a bold, lowercase sans-serif font with a registered trademark symbol, and "mobile" in a smaller, lowercase sans-serif font below it. A stylized white speech bubble tail is positioned to the left of the "o" in "socket".

s@cket[®]
mobile



03. Smarter processes to efficiently handle routine workflows

Accelerate results with modern processes.

Improve operational speed and scale to achieve success

Use inbuilt Dynamics 365 tools to reinvent your workflows with smarter processes and greater automation.

- ✓ **Guided processes.** Provide prescriptive guidance to help users reach successful outcomes across any workflow. See at a glance the latest updates on tasks and what needs to happen next.
- ✓ **Consistently manage any process.** Map process steps and stages to any repeatable workflow. Use Dynamics 365 apps to handle diverse processes such as sales leads, inbound applications, support requests and maintenance visits.
- ✓ **On-board new starters and re-skill employees** with contextual guidance to progress routine tasks.
- ✓ **Enforce processing rules to ensure consistency** that reflects your methodology. Enrich data by setting a uniform standard, and reduce time spent across simple or complex processes with workflows that can include branching logic and multiple stages.
- ✓ **Increase efficiency with automated workflows.** For example, set these to trigger based defined time periods and dates, or when approval requests and other actions occur.

03. Smarter processes to efficiently handle routine workflows

How we increased scalability by connecting processes.

Who?

Future Fit Training provide quality training and learning platforms for fitness professionals.

FUTURE FIT
TRAINING

Why?

The organisation was struggling with slow and manual processes that stretched out the onboarding of new students.

The results?

Future Fit Training speeded up its enrolment process by deploying automated Dynamics 365 workflows. This also enabled it to provide students the ability to check the course availability and book online.



“Just a couple of months after moving from Salesforce to Dynamics 365, we had our best sales month!”

- Head of Commercial, Future Fit Training

03. Smarter processes to efficiently handle routine workflows

Never forget important tasks

Power Automate can be used to regularly run flows that will pick up on actions that could be missed. For example, run daily checks on leads that haven't had any contact in a week. Or receive in-app notifications when there's a risk of breaching a service level agreement (SLA).

Connect your apps

Choose from hundreds of pre-built Power Automate connectors and templates to boost efficiency by quickly and securely automating more tasks across applications.

Let AI reduce manual data entry tasks

Use embedded intelligence capabilities to ensure processing accuracy by automating more tasks. By reducing repetitive, time-consuming tasks, teams can focus more on the jobs that really add value.

Examples include

- ✓ Automatically extracting structured data from PDFs and forms, such as invoices and orders.
- ✓ Converting written notes into digital documents.
- ✓ Creating new Dynamics 365 records from the extracted information.

“Using Dynamics 365, our partners are guided through a series of steps which provide clarity on what needs to happen. And this enforces the rules that we must follow to ensure these processes are compliant with the terms of our funding.”

-Data Lead, The Matthew Project

04. Personalise messages, and align sales and marketing

Connect your data with Dynamics 365.

Treat customers as individuals - at scale

Marketing want to start meaningful conversations. Sales want to boost the bottom line. With Dynamics 365, you can do both.

- ✓ **Launch the right campaign at the right time.** Anyone can see the relationship with a contact and start a campaign based on that insight, meaning your communications are relevant and personal. If marketing has a variety of campaigns ready - including reactivation, nurture or awareness scenarios - any team can deploy these.
- ✓ **Strengthen communication between sales and marketing** with campaign transparency and shared history. It doesn't matter who last contacted a customer. Since it is stored in one place, everyone has visibility.
- ✓ **See a complete view of every customer relationship** across all teams, wherever people work, and on any device.
- ✓ **Turn sales-ready leads into orders.** Develop a predictive lead scoring model, and use this to identify the best leads to target and assess the action required. Using a model to score leads helps focus time on right prospects to increase win rates.

04. Personalise messages, and align sales and marketing

How we helped target customers at the right time, with the right message.

Who?

Patient Advocacy Service, a non-for-profit individuals detained under mental health and criminal legislation.



Why?

By leveraging Dynamics 365, PAS could ensure the privacy and security of their sensitive conversations with patients. The transition to this modern database system was significant, revolutionising their operations and simplifying their workflow.

The results?

Dynamics 365 saved PAS a considerable amount of time, allowing them to prioritise patient care over administrative tasks, providing more opportunity to target customers at the right time, with the right message.



“Overall, the impact has been positive in all areas such as the team, and the work we’re doing and recording, which is ultimately the most important thing as it shows the work we do with patients.”

- Rebecca Carr, Service Manager at Patients Advocacy Service

04. Personalise messages, and align sales and marketing

What's next for customer engagement?

Dynamics 365 real-time marketing

Evolve how you connect with customers and prospects. No longer simply segment based on large categories and send bulk messages, but trigger journeys based on your customers' actions in real-time.

Whether that is making a purchase, attending an event, or downloading content from your website, follow up with timely, personalised communications to win business and strengthen relationships.

For example, activate customer journeys based on real-time data changes across Dynamics 365 apps to engage recipients across email, mobile, SMS and in-person touchpoints.



05. Create greater value to exceed expectations

How to increase customer loyalty with Dynamics 365.

Provide the best service and earn customer loyalty

Connect with your customers whenever, wherever and however they need. Being able to engage clients with the correct information, via the most suitable channel, on time, transforms how organisations can build customer loyalty.

- ✓ **Empower customers to find answers** at any time by deploying CRM-integrated web portals that enable interaction through a responsive website
- ✓ **Effectively manage inspections, maintenance jobs and other site visits.** Whether it's a regular check, in response to a reported problem, or proactively responding to notifications from IoT technology, use Dynamics 365 Field Service to dispatch the best person and maximise the productivity of your resources.
- ✓ **Provide omnichannel support** across Chat, SMS, Voice, Social Networks and Microsoft Teams, all integrated with Dynamics 365 Customer Service. Having a single record that shows all the interactions, ensures that everyone can easily catch up and be fully informed before sending further communications.
- ✓ **Support users with an engaging knowledge base.** Share proven solutions, FAQs, demonstration videos and informational links. These can vary based on the entity users are viewing, the customer they are dealing with, or even the app they are using.
- ✓ **Effective case management.** Utilise functionality for service entitlements, SLAs, knowledge bases and routing rules that will ensure service issues are resolved promptly by the most appropriate resources.

05. Create greater value to exceed expectations

How we ensured service excellence using a web portal.

Who?

BeBa Energy, a renewable energy company specialising in solar assets.



Why?

The company wanted to give its clients greater transparency and convenience.

The results?

BeBa has improved service delivery thanks to its Dynamics 365 connected web portal. Demonstrating the availability of this resource has also helped the company acquire new customers.



“With ANS’s help, we’ve now deployed a portal, enabling our customers to log new cases, check the status of existing cases as well as check the important detail about their agreements including service and expiry dates and insurance details.”

- Technical Director, BeBa Energy UK

How ANS helps organisations drive digital transformation.

In this guide you've seen examples of how Dynamics 365 helps organisations extract data-driven insights, operate efficiently and earn customer loyalty. Whilst Microsoft has made this technology accessible to self-start, you might find you reach a point where you're not sure what to do next. Or perhaps you simply don't have the capacity or internal resource to get the most value from your technology. This is where ANS can help.

Innovate and thrive with the help of our Dynamics 365 and Power Platform experts. You'll be able to do more to delight your customers, and change your data culture to stay agile and drive continual efficiencies.

Use ANS' CRM starter packs to rapidly deploy Dynamics, and then expand your system by using our Elevate 365 managed service. This all-in-one subscription gives your team access to technical consultancy, helpdesk support, training resources, packaged solutions and regular engagement calls.

No matter what stage of your digital transformation journey you're at, we promise you'll receive straightforward advice that focuses on your specific goals to support you in gaining the best value from your technology.

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