



Dynamics case study

SolutionsPT

Delivering optimised efficiencies and profitability by integrating siloed systems with Microsoft Dynamics.

SolutionsPT prides itself on delivering real change, with the provision of industrial software, hardware and services to their 2000+ strong customer base in the industrial and manufacturing sectors.

With a mission encompassing the drive for continuous improvement and success with world-class digital solutions, it's easy to understand why they sought to consolidate their CRM and Finance platforms to modernise their approach to customer engagement.

Recognising the need to modernise internal systems

SolutionsPT quickly realised that they were held back with disconnected and inflexible systems, which resulted in unnecessary manual entries and reduced user satisfaction. This in turn led to poorly maintained data and off-system workarounds which made reporting onerous.

Rather than maintaining a single point of data entry, poorly maintained data in silos across different systems often resulted in inconsistent figures reported for the same parameters. Due to these inconsistencies and restricted by difficulties arising with bespoke implementation, departments across the company were required to help produce simple financial reports. Amongst other things, this made it difficult to measure marketing effectiveness and to measure ROI on marketing effort.

Identifying a solution and partner for change

After a comprehensive selection process, Microsoft Dynamics Customer Engagement was selected as the right tool to replace SolutionsPT's existing CRM and Helpdesk. In seeking the right partner to configure and implement the solution, Kick ICT was selected to be their Microsoft Dynamics CE expert and implementation partner.

Collaborating for continuous improvement

SolutionsPT's driving philosophy for implementing the first phase of the project was to find a solution that could be used 'as-is'. Using 'out of the box' Dynamics features to modernise core business processes and adapting ways of working to fit with the technology, rather than tweaking the technology to mirror ways of working.

Engaging on a programme of continuous improvement, Kick worked with SolutionsPT to build on solid foundations and enhance and develop processes, by automating administrative tasks to eliminate keystrokes and human error in data entry.

SolutionsPT now benefits from one single source of the truth – using Microsoft Dynamics as their trusted master of data for marketing, leads, opportunities and pipeline. This in turn allows for strategic, data-driven decision-making, benefiting from self-service dashboards and reporting to create an all-encompassing and visible representation of ROIs. Lead funnels make it easy to set meaningful targets for revenue generation, directly from marketing activities.

“Kick ICT were an absolute pleasure to work with. Their grasp of the scope and of our requirements was outstanding, translating into a system which rolled live with very few issues.

Kick led us through the design and implementation stages, giving us guidance and advice on how to achieve our required outcome, holding us to our design philosophy of COTS first/out of the box features. They were very responsive, always happy to respond to questions, and always with a smile. A trusted extension of our internal project team.”

Melanie Owens/
Business Improvement Project Manager

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Industrial IT Solutions

