Logicalis connects people, information, and processes after implementing Microsoft Dynamics GP, CRM, and a custom quote tool from sa.global

Client overview

Logicalis is a UK-based provider of integrated information and communications technology infrastructure and services.

Solution

sa.global implemented a fully-integrated solution incorporating Microsoft Dynamics CRM, Microsoft Dynamics GP, Advanced Recurring Billing, and a custom quote tool for Logicalis.

Results

Implementing the solution helped Logicalis:

- Increase business visibility and insight
- Improve productivity
- Reduce operating costs

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Company overview

Logicalis is an international provider of integrated information and communications technology (ICT) solutions and services founded on a breadth of knowledge and expertise in communications and collaboration, data center, and professional and managed services.

With its headquarters in the UK, Logicalis employs over 1,900 people worldwide. These include highly trained service specialists who design, specify, deploy, and manage complex ICT infrastructures to meet the needs of over 6,500 corporate and public sector customers. To achieve this, Logicalis maintains strong partnerships with technology leaders such as Cisco, HP, IBM, and Microsoft.

Different platforms lead to lack of visibility

Following a period of strong growth and several acquisitions, the senior management team at Logicalis UK Ltd initiated a project to review all major applications and improve processes across the business. As a part of this review, it was identified that there was a need to replace the current CRM system to track all customer requests from initiation through delivery.

Prior to the systems review, Logicalis used Sage CRM and CommuniGator to manage the sales pipeline and email marketing campaigns, Microsoft Dynamics GP as the core accounting solution, and a Microsoft Excel-based tool to generate customer quotations. Stand-alone applications and the lack of integration between systems had resulted in duplication of work and data, insufficient visibility into customer communications, and inefficiencies.

Explaining the issues that the company faced, Natasha Towns, Business Applications Manager at Logicalis said, "The lack of integration between the different systems made visibility into customer communications difficult. Using different applications across departments meant there were no best practice processes in place or auditing capabilities."

An integrated solution to simplify quotation generation processes

Logicalis generates quotes for multi-vendor solutions and serviceson a daily basis. Quotes can be complex - all the quotes go through a Technical Validation Process to confirm that the customer's requirements are met and that all the necessary components are listed. If a customer requests a change to the quote, the revised quote goes back through the validation process to confirm the new configuration. For Logicalis, the key to the overall project and affecting all departments was the need for a solution that would manage an average of 1,300 quotations that the Customer Relationship Executives (CRE) were generating on a monthly basis.

The Microsoft Excel-based tool that was in place had been designed and adapted over four years. As Logicalis expanded and changed as a business, processes became more complex and the tool became difficult to support and expensive to maintain. Eventually, Logicalis was using five different instances of the tool to accommodate different aspects of the business. Towns commented, "We generate 1,300 quotes per month on an average – sometimes up to 10 versions of the original quote can go through the validation process prior to sign-off. The lack of workflow and ability to monitor communications created a lot of email traffic with no way of effectively tracking the latest versions of quotes."

The lack of integration between systems was also impacting the Sales and Management teams within Logicalis. Towns explained, "The sales team were only using Sage CRM in a limited capacity. The system did not integrate with other solutions in use, did not store or track emails, and was not considered user-friendly. The lack of centralized data made producing an accurate forecast extremely time consuming for the management team. Hence a more effective solution was required."

Identifying the right CRM solution

Following a full review of requirements, a decision was made to replace the existing Sage CRM and Excel quote tool with a new CRM solution that would manage quotations, customer support processes, and provide the sales team with a user-friendly solution for managing opportunities.

The solution had to be a fully integrated and centralized solution, which would meet the following business objectives:

- Increase business insights: Track all customer orders and requests from inception through delivery

- Enhance productivity: Make it easier to do business with customers and suppliers

- Reduce operating costs, including cost per transaction

- Improve sales forecasting capabilities

When it came to software selection, Logicalis identified Microsoft Dynamics CRM as a potential solution. Microsoft Dynamics GP (formerly Microsoft Great Plains) had been in use within the UK office for the past five years and was also used in the US head office to manage customer and supplier invoicing. The new CRM had to integrate with the existing finance system.

On review, it was clear that Microsoft Dynamics CRM could meet many of Logicalis's requirements because of its out-of-the-box functionality. A full CRM suite with marketing and sales capabilities, the solution provided workflow tools that streamline and automate everyday processes promoting shorter sales cycles, and the ability to deliver a consistent, efficient service that would enhance productivity. Full integration with Microsoft Outlook provided the ability to track all customer communications and gave a 360-degree view of the customer.

Microsoft Dynamics CRM also provided a highly customizable platform for further development, which became a must in terms of meeting their requirements around customer quotations. Towns explained, "The quotes we produce for customers are complex. Solutions are made up of kit, services, maintenance and managed services, supplied by both Logicalis and a number of different partners, with different pricing models. The quote tool had to be very intelligent to cope with this. We realized that no one 'out-of-the-box' solution was going to meet our exact requirements and customization would be required."

Having identified Microsoft Dynamics CRM as the solution of choice, Logicalis began the process of selecting a partner to deliver the solution and issued an Invitation to Tender to a number of partners in the Microsoft channel.

Selecting the right implementation partner

sa.global had been a Logicalis partner for 12 months providing support and consultancy for the Microsoft Dynamics GP solution in place within the organization. Following a series of meetings with potential suppliers, the company was selected as Logicalis's partner of choice for the CRM project.Towns explained the reasons for selecting sa.global, "sa.global had proven success within Logicalis. When we moved the support of our Microsoft Dynamics GP solution to them, the improvement in the level of service was both immediate and impressive. The support team were very easy to work with and were efficient in responding to and resolving our cases. The consulting team was professional, knowledgeable, and went the extra mile – always looking at alternative methods of improving processes and meeting our requirements."

While sa.global's experience in implementing and supporting Microsoft Dynamics GP and Microsoft Dynamics CRM was the key reason they got chosen, it was sa.global's proven ability in further developing Microsoft Dynamics solutions that secured their position as the preferred partner. Through its dedicated in-house .Net Development team, sa.global had already implemented its own Advanced Recurring Billing solution to manage Logicalis's recurring customer contracts on time and within budget.

Towns continued, "sa.global had proven experience with both Microsoft Dynamics GP and CRM and had already delivered a fully integrated custom solution for Logicalis, which was already providing a rapid return on investment. Their approach in scoping out our requirements and providing a solution for the quote tool was meticulous. We were confident sa.global could deliver."

Having selected Microsoft Dynamics CRM as the solution of choice and sa.global as its preferred partner, Logicalis initiated a project that would see the implementation of a new CRM solution, integration to Microsoft Dynamics GP, and a custom Microsoft Silverlight quote tool - connecting people, information, and processes.

Automate processes to reduce time taken for sales cycles

Working with aggressive deadlines, sa.global implemented Microsoft Dynamics CRM, integrated the solution to Microsoft Dynamics GP and Advanced Recurring Billing, and developed a custom Microsoft Silverlight web-based application quote tool for Logicalis on time and within budget. With the custom quote tool, the CREs could generate accurate orders for customers using any combination of components.

The kit list descriptions and pricing information could be pulled in automatically from Microsoft Dynamics CRM using the correct currency (USD, GBP, or EUR) and allowed Logicalis to manage margins and variants to standard pricing. Quotes, which can be over 600 lines long and include kit, installation, services, support, and SLA information, were automatically stored against the customer record within Microsoft Dynamics CRM, providing full visibility to the sales team.

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