



Document Network Services Successfully Transition Microsoft Dynamics 365 to the Cloud with **Synergy Technology**



Background

Document Network Services is an independent supplier of managed print services, document management, IT and communications. Its aim is to help local and national organisations overcome issues and problems they have within their business processes by simplifying, automating and streamlining their activities.

Introduction

Document Network Services (DNS) have been using **Microsoft Dynamics CRM** now renamed **Microsoft Dynamics 365 Sales** since 2008. Originally, it was an on-premise solution which was a good option at the time, however with a desire to move to the cloud, Document Network Services turned to its consultants Synergy Technology to help this transition.

Synergy Technology had worked with Document Network Services to implement Microsoft Dynamics CRM and knew the site structure and supported the solution well. Document Network Services uses the solution across all teams, from Sales, Administration and Finance to Support.

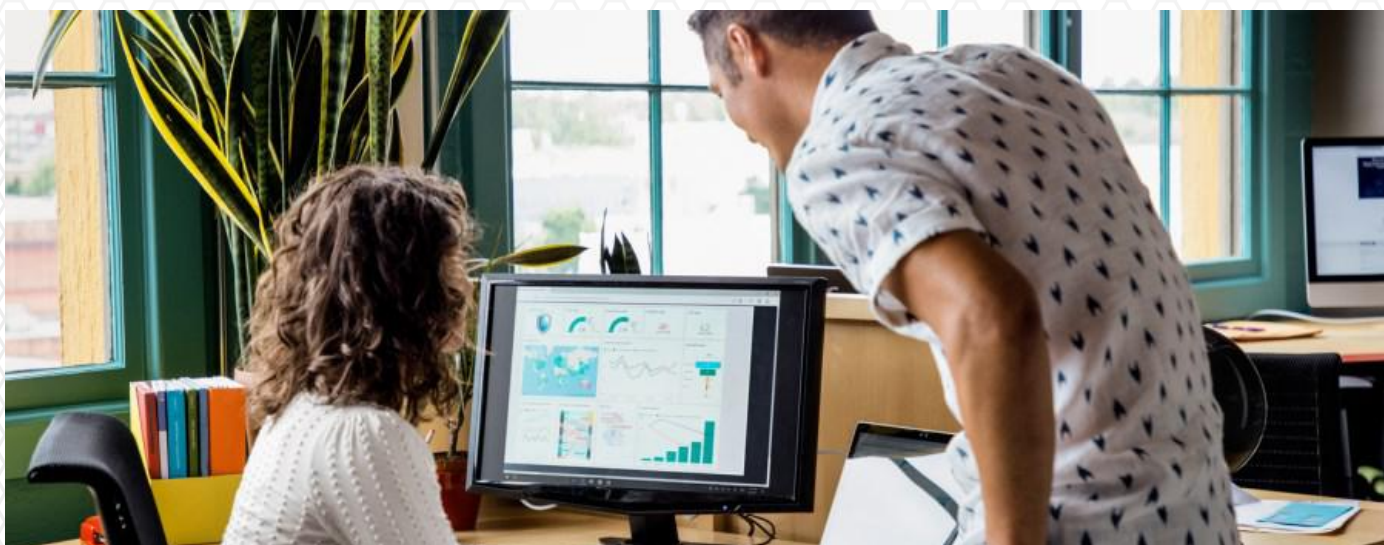


Microsoft Dynamics 365 Sales was used daily by all to keep in contact with customers, track conversations and emails, securely hold client contact details and contracts.

Document Network Services also use Microsoft Dynamics 365 Sales to record all its clients' products and services, with start and end dates, contract lengths and costs; everything is in one place. Microsoft Dynamics 365 is a pivotal system for DNS.

For Document Network Services the challenge was to move into the cloud with all its business applications, file storage, emails, and CRM (Microsoft Dynamics 365 for sales and customer service).

Hugh Sutherland, Sales Manager at Document Network Services explains, "We were keen to migrate everything to the cloud to improve our remote working, mitigate risk of on-site server issues, reduce the cost and burden of managing the servers on-site and improve the performance of the Sales team using CRM out on the road or working from home in the evening."



The Solution

Moving to the cloud

Through initial discussions it was clear that move to the cloud was a good opportunity and would also offer the ability for Document Network Services to expand the functionality of the system as the Online (Cloud) version of Microsoft Dynamics 365 has more features than the on premise solution.

Synergy Technology set out a presentation of the differences of the solutions and some ideas of how Document Network Services could use some of the cloud features to reduce costs and make efficiencies.

Rebecca Fawcett worked with Document Network Services as Project Manager at Synergy Technology and commenced by setting out the scope of work using a diagnostic scoping document. This ensured clarity for both businesses so they can work as a partnership to successfully make the transition.

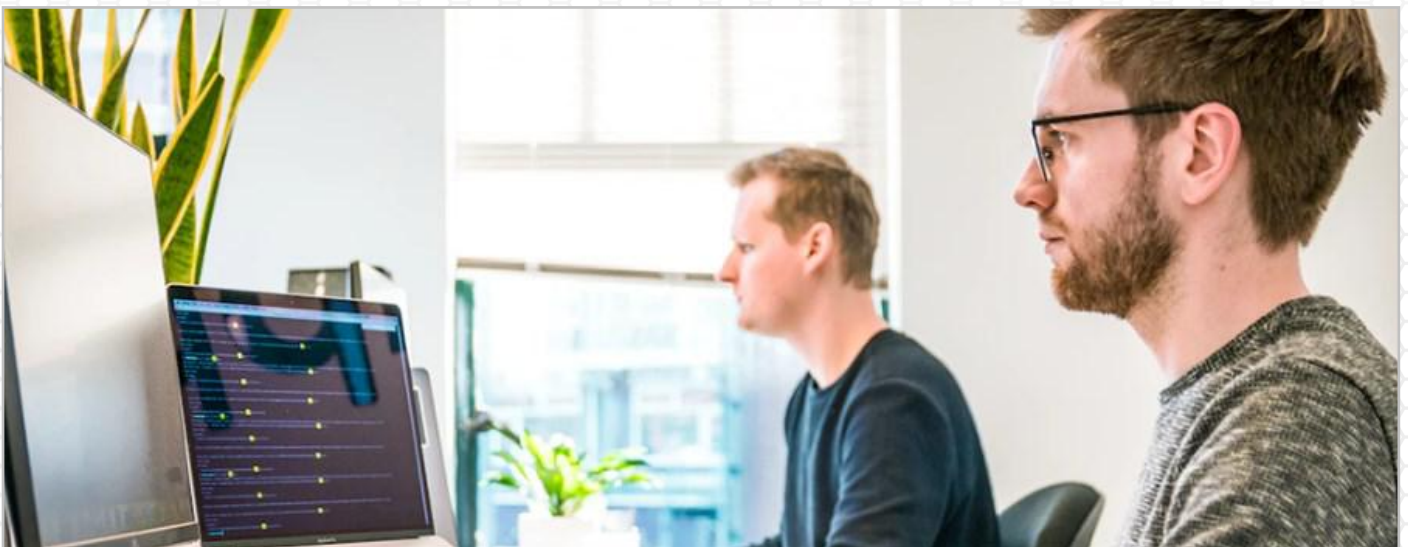
This scope offered Document Network Services an overview of the process, what would be transferred and how it would work, as well as providing timelines of project delivery.



Darren Marsh, Managing Director at Document Network Services established, “The CRM transition to cloud implementation was seamless, it was all taken care of by Synergy Technology with minimal downtime. All our client data, records, activities were transferred over to the new system, with a very fine eye for detail on trivial things such as Advanced Finds being transferred, contact data and contract information. It was like overnight the system just transformed from an ageing on-premise solution, to the cloud, with a fancy new look and feel and no issues from the get go.”

Significant Benefits

Darren confirms, “Microsoft Dynamics 365 Sales has improved our business so much over the recent years since transition to the cloud. We used to use an on-premise version of the solution which meant that it was only accessible using a VPN network if we were not in the office. For a remote working sales team, this was difficult to manage when VPN connectivity was down or inconsistent, especially due to the fact our internet connection was poor in the office at the time.”

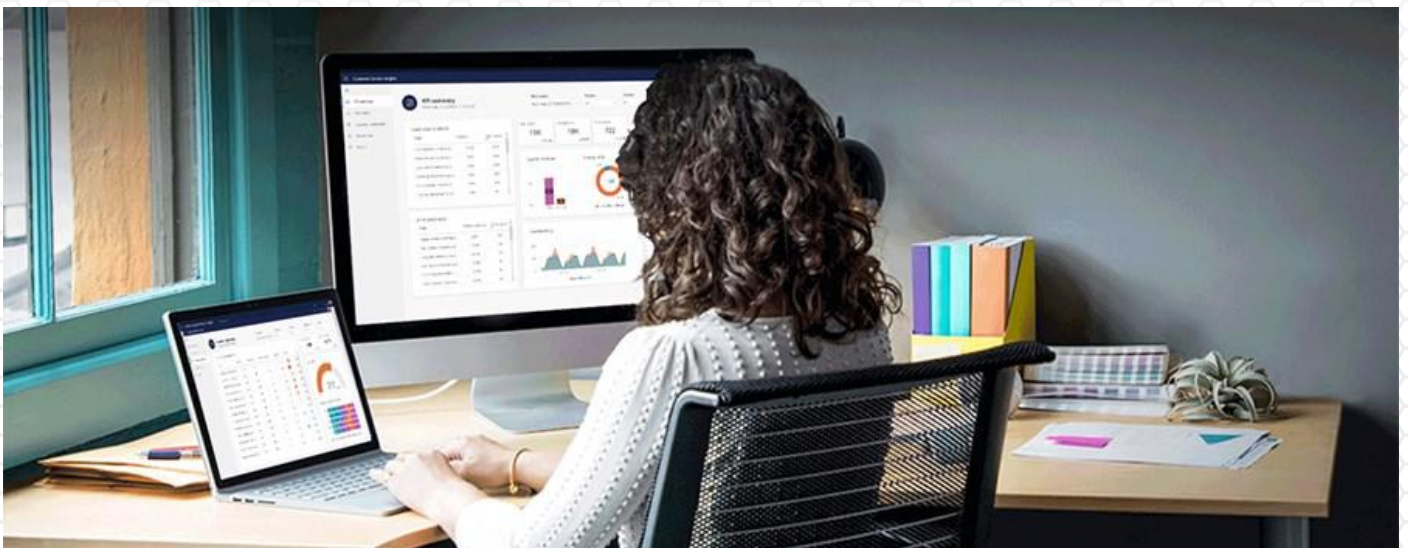


“Moving to Microsoft Dynamics 365 Sales has enabled the whole team to have full access to client data, information, recent and future planned activities, quotes, proposals and contractual information at our fingertips.”

Other benefits that Document Network Services enjoy is that all opportunities are loaded into Microsoft Dynamics 365 for sales so that it has full visibility of what is being worked on, what revenue is expected to close each month for each Account Manager, and the use of Power BI to have a dashboard of opportunities that Synergy Technology has helped to develop.

Hugh confirms “We couldn’t live without Power BI and the data from Dynamics 365 for sales and customer services now. It’s an amazing tool that gives you high level information whenever you need to report on it.

When users are on holiday, or in meetings, we can pick up where they left off, seeing any calls, emails or projects Account Managers are working on so we’re never left in the dark.”



Additionally, Document Network Services has an extensive database of 'prospect' data which has been developed and built on over the years, including the benefit of being able to import data into the system. This helps its new business strategy with clear recording each time Document Network Services speak with prospecting clients, adding new users and third-party contractual information so that Document Network Services know when prospecting clients will likely be looking at renewing their services.

"We use a third-party marketing mailing tool called DotDigital, which integrates into Microsoft Dynamics 365, meaning we can email clients, prospects and even suppliers, and track each email sent, received, opened, viewed, clicked, the whole trail" he confirmed.

Each team within Document Network Services has a different role to play, from the outbound sales team, to account managers, administration department, finance and support.

Each department uses data all of which is fed into Microsoft Dynamics 365 for sales and customer service.



Hugh further explained, "A difficulty in any business is communication. Utilising Microsoft Dynamics 365 Sales removes this stress. We have full visibility of every customer, every prospect, every internal meeting and email. All in one place. We simply couldn't operate without."

Document Network Services revealed that the best part about using Microsoft Dynamics 365 sales and customer service as an Online solution would be the fact it's web-based and integrated into Office 365 now renamed Microsoft 365.

Simply logging onto Office.com from any browser gives any user the ability to log into their emails and SharePoint files, but also into Microsoft Dynamics 365 using single sign on. Document Network Services confirmed that a huge benefit of it being cloud based is that so many third-party applications (not just Microsoft) can integrate with it, offering the power to manipulate data, dashboard your results and increase productivity and customer engagement.



“Synergy Technology worked closely with DNS to understand what we used our CRM for, how we interact with the tools and what changes we had made over the years ensuring all of these changes and ‘upgrades’ followed through into the new Online Microsoft Dynamics 365 for sales and customer services solution. It really was seamless!”

The system is continuously evolving as processes evolve and updates are patched by Microsoft every 6 months. Synergy Technology helps to keep Document Network Services informed of what will be included in the updates through newsletters and regular contact with their account manager.

Rebecca Fawcett, CRM consultant at Synergy concludes, “As Project lead of this particular migration to the Microsoft Dynamics Cloud, I found working in partnership with Document Network Services important as any other aspect of the project. By following a strict transition process means we can analyse, review and continually improve the implementation strategy and this is a task we have been carrying out for a number of years. Following a successful go-live we have continued to support and develop Document Network Service’s Dynamics 365 for sales and customer service system together with Power BI reports to remain in line with their business objectives.”

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