

Fullscope helps the CBI to gain a better understanding of its customers

Cloud based CRM provides a flexible and fully integrated approach giving the organisation a 360-degree view of its data.



CBI, the Confederation of British Industry, the UK's premier business organisation, was using an on-premises CRM solution and was not able to take advantage of the greater functionality of a cloud-based CRM system.

It wanted to get closer to its members and understand when, how and why they bought additional services from the CBI. Its existing CRM solution could not achieve this. The CBI struggled to get its staff to adopt the old CRM solution, so it chose to switch to the cloud-based Microsoft Dynamics 365 platform, which would also enable it to integrate CRM with the rest of its Microsoft solutions. The tight integration across the Microsoft product family creates a compelling case for companies to move to Dynamics 365.

A partner with a proven track record

The CBI was looking for a partner that had experience and a proven track record of upgrading on-premises CRM to the cloud. It also wanted a partner that had a clear implementation strategy.

Fullscope, an Alithya company, ran a business outcomes workshop for the CBI's executive team, including the Deputy Director General, the Chief of Staff, the Commercial

Top three business outcomes

- Improve interactions with prospects, customers and partners
- Better support management decision-making
- Increase revenue from existing customers

Operations Director and the Head of Marketing, to identify their priorities and to establish the ROI for the project. Fullscope was able to help the CBI to identify the top three business outcomes that the organisation would like to achieve from CRM.

360-degree view of all data

The project was then implemented and, since upgrading, the CBI has been able to integrate its financial systems (Microsoft GP) with Microsoft Dynamics 365. The CBI has now gained a flexible and fully integrated CRM system that offers the organisation a 360-degree view of all its data.

Future CRM projects for the CBI will help them to achieve their business outcomes by creating a better client service experience with portal integration and Voice of the Customer, while Power BI will help the management team to interpret and act on business intelligence.

About Fullscope

Fullscope, an Alithya company, delivers innovative Microsoft ERP, CRM and BI solutions and services to companies in North America and the UK. The award-winning company is one of the largest resellers of Microsoft Dynamics 365 (formerly Dynamics AX and CRM). We also offer strategic consulting delivering a blend of classic and product-based consulting services that help clients reduce costs, improve processes and increase revenue through the judicious use of technology. We continually fine-tune our process and user-adoption programs to give you the maximum return on your investment. This commitment to stay with you throughout your Dynamics 365 journey has earned us the highest customer retention rate in the business.