

## CASE STUDY

# CBI Professional Services

The CBI has now gained a flexible and fully integrated CRM system that offers the organisation a 360-degree view of all 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.

## Top Three Business Outcomes

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

## 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-premise 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 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.

**THE TIGHT INTEGRATION ACROSS THE MICROSOFT PRODUCT FAMILY CREATES A COMPELLING CASE FOR COMPANIES TO MOVE TO DYNAMICS 365.**

**FULLSCOPE BECAME PART OF THE ALITHYA GROUP IN NOVEMBER OF 2018.** Alithya is a leading strategy and digital technology company with over 2,000 highly skilled professionals delivering solutions across Canada, the US and Europe. Alithya's Microsoft practice covers a wide array of capabilities including Dynamics, Azure, business analytics, digital solutions, advanced analytics, application development and architecture. Focused on business outcomes, our combined companies have delivered Microsoft ERP, CRM, BI and digital solutions to over 1,200 clients. Alithya's global offering is to deliver strategy and digital technology services.

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