

## Leading IT services business builds a platform for growth with Microsoft Dynamics

A leading technology supplier with eight offices in the UK & Ireland, Bytes helps organisations procure and manage their software, security and document solutions – reducing cost and improving performance.

With plans to build further upon its enviable record of 30 years of consistent growth, Bytes Technology Group needed a CRM system that would deliver freedom to its sales force and put more power in its pipeline. By switching from SalesLogix to Microsoft Dynamics CRM, the sales teams at Bytes have more time to focus on the business of selling, and the management team can access powerful pipeline and whitespace analysis reports at the touch of a button.

Keith Richardson, Finance Director at Bytes Technology Group (BTG) wanted to find a way to harmonise and leverage customer data across BTG's three business divisions: Bytes Software Services, Bytes Document Solutions and Bytes Security Partnerships. He needed a solution to bring sales and pipeline data for each of these businesses into a central place that would provide powerful reporting but also be intuitive for the sales people to use.

*"Our existing SalesLogix system had three access points and each had a different, cumbersome,*

*interface. This meant user adoption and data capture was low and our opportunity to query and utilise important customer information for sales forecasting was far from where I wanted it to be. I knew that Microsoft Dynamics CRM connected seamlessly with Outlook, and so sales team adoption would be guaranteed because it's the first application they log into each day."*

Richardson created a list of requirements that the selected CRM solution would have to meet:

- > Harmonise customer, pipeline and sales information across the Group
- > Provide reliable sales reporting and whitespace analysis dashboards
- > Connect to the Group's purchasing portal, finance system and third party contract management information
- > Build a platform for sales growth that would support the expansion plans of the group over the next 3-5 years.

### Client >

Bytes Technology Group

### Sector >

Business Services

*"Moving from SalesLogix to Microsoft Dynamics CRM has increased sales productivity, simplified pipeline and is helping us to build a platform for our planned business expansion."*

Keith Richardson >  
Finance Director >  
Bytes Technology Group

# Bytes Technology Group

## Solution

Requirements for lower cost of ownership, improved ease of use and tight integration with existing ERP and desktop systems made Microsoft Dynamics CRM an obvious choice for Bytes Technology Group. The next task was to select the right partner to work with.

**Keith says:** "We were on a very tight timescale and needed whoever we selected to take us from concept to 'go live' within five months. ConsultCRM's workshop-based approach provided us with the confidence that by using Microsoft Dynamics CRM and the skills of their implementation team we could achieve what we wanted within the specified timeframe."

**Peter Norman, Principal Consultant at ConsultCRM continues the story:** "Due to the urgency of the project, we planned and executed a solution that gave high visibility of progress throughout the process. In order to deliver on time it was important to maintain this sense of focus and momentum and ConsultCRM collaborated really well with the Bytes senior management team, stakeholders and developers."

**Norman continues,** "It's just common sense; Bytes wanted a successful project, so they committed the right level people and time to work with us and that contributed to the positive outcome. As a result ConsultCRM was able to deliver valuable functionality such as the ability to manage multiple account ownership and integration to the Bytes purchasing portal and finance system. This now provides a 360 degree customer record containing prior, current and predicted spend, with global visibility of all interactions at an account level."

## Results

With the implementation of Microsoft Dynamics CRM, Bytes Technology Group has been able to bring its sales pipeline into a single, intuitive, highly scalable environment that frees up its sales people, connects seamlessly with its

existing Microsoft and third party software estate and provides highly valuable business insights to the sales management and broader leadership team. Through working with ConsultCRM to implement the solution, Bytes Technology Group has achieved:

- > Cost savings associated with maintaining & developing SalesLogix.
- > Concept to delivery in five months. **Richardson says:** "This is less time than it took to implement the original, and much smaller, SalesLogix CRM system."
- > Exceptionally high user adoption thanks to seamless Outlook integration. "Sales people go to Outlook as soon as they turn on their PC," says Richardson, "This made Dynamics CRM an obvious choice."
- > Quick and easy reporting at individual, team and divisional level. "The sales people and sales managers can now self-serve. This saves us time and money compared to the time it used to take to produce or develop these reports," says Richardson.
- > The ability for Bytes Document Solutions sales people to view full customer contract billing history. **Richardson explains:** "Historically this team would not have had access to this system. Now they're able to structure a better deal for their customers."

Such has been the success of this project that further phases are planned to introduce additional service management functionality that will provide Bytes Technology Group with a first-class customer management platform to match the first-class service they provide to their customers.

**Richardson concludes:** "We're delighted with the results the project has brought us so far. We're looking forward to the next phase."

*"Our existing SalesLogix system had three access points and each had a different, cumbersome, interface. It was difficult to import data and produce reports and expensive to develop and maintain, so we knew we had to switch."*

Keith Richardson >  
Finance Director >  
Bytes Technology Group

## More information

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