

# AerFin

## AerFin optimises data management with the support of Microsoft Dynamics 365 Sales



### About the organisation

AerFin is a fast-growing, global aviation company specialising in aircraft and engine aftermarket services. With its team of highly experienced aviation experts and extensive and high-quality inventory holding, it offers bespoke services ranging from whole aircraft and engine sale or lease, through to tailored flight-hour component support solutions. It supports airlines, lessors and MRO customers worldwide to reduce maintenance costs and keep fleets flying, through flexible component support and leasing solutions.

Headquartered in South Wales, AerFin has inventory and offices located globally in London, Miami, Dublin and Singapore.

### The Challenge

Seeking to strengthen the business and build long-term relationships with its customers that go beyond anything else available on the market, AerFin is backed by private equity firm, CataCap, and ready for further international expansion.

Buying and selling aircraft and engines across the world, each transaction is bespoke and often involves an extensive team of people both on the AerFin side and the customer side. The business needed a way to more deeply understand

### Highlights

Aviation specialist achieves single source of truth in its sales and customer data with Microsoft Dynamics 365 Sales

Seamless, 360-degree visibility leads to engaging user experiences to support lead-generating opportunities

Efficiency gains strengthen business and help build long-term customer relationships

Dynamics 365 Sales empowers staff to collaborate and communicate easier

its customers and connect teams, processes and data across its interactions and sales opportunities.

Enhancing operational agility and accelerating visibility of customer

insight with the latest CRM technology would support its tailored customer experiences and maintain its reputation for meticulous reliability and efficiency.

## Solution

The company chose Dynamics 365 Sales for its out-of-the-box functionality, customisable tools and the ability to create connected sales processes and bespoke customer experiences.

Ben Pinington SVP of Transformation, AerFin, highlights, **“We reviewed three solutions and felt Microsoft Dynamics was not only more enterprise-facing, but provided ease of adoption and value for money allowing us to roll it out to all staff, not just our**

**trading team. In addition, combining Microsoft Power BI with Microsoft Dynamics 365 would be invaluable as we continue to enrich our data reporting with the CRM.”**

AerFin wanted to work with a Microsoft Gold Partner who was committed to helping deliver on its business outcomes. Ben adds, **“Xpedition demonstrated its understanding of our goals and, importantly, showed us how the out-of-the-box solution didn’t need to be over-customised.”**

## Working with Xpedition

**“Xpedition’s aim was for us to self-manage as much as possible, so that we didn’t have to heavily rely on them going forward. Upskilling super users within the business who can do low-code customisations worked really well.”**

Eugene Assaf, Business Analyst, AerFin

**“When we started the discovery phase with Xpedition, it was clear they had done this many times before,”** says Eugene. **“They advised us to adopt a simple, logical, and phased approach without over-complicating anything. Keeping the system intuitive was important for us to drive adoption.”**

AerFin involved members of staff from different areas of the business to walk through their processes and share the documentation they were using. This gave Xpedition a really deep insight into how different staff and teams currently work, how they could collaborate further going forward and to identify efficiency gains for the future. Having these key champions across the business would also make it easier to roll out the solution widely.

Having a single source of truth is key to AerFin. It helps ensure it can service the needs of a rapidly expanding customer base, delivering the solutions they need when they need them at a competitive price point. Deploying Microsoft Dynamics 365, the business has connected its sales process by automating interactions between departments, making it easier to track progress and maintain full visibility between different teams.

Throughout buying and selling, numerous actions demand input from various team members across AerFin’s business. Everyone has clear visibility and quick access to the information they need. The trading and sales teams

log high-value sales leads into the centralised system.

The integrated phone system allows the team to instantly see who is calling and bring up any communication history for that customer or sales lead, while site visits are recorded immediately via mobile phone. The CRM is also used by department heads who get the regional information they need for team updates with actionable tasks.

Overall, AerFin has streamlined processes and empowered the trading and sales teams to gain greater insights out of the data. Ways of working have changed, increasing productivity and efficiency, and best practices have been adopted.

Collaboration between staff is easier because actionable customer and sales data is available in a 360-degree view at the click of a button.

**“The simplicity of what we’ve created has led to faster and higher adoption rates, with staff accessing the system from wherever they are, whether via mobile, in the office or on the road,”** says Ben. **“Although too early to say for sure, our lead conversion rates are already set to increase since the Microsoft Dynamics 365 implementation, while we are already seeing the quality of our data dramatically improve.”**

## Benefits

- › Streamlines communications to support customers and sales operations.
- › Gives AerFin a complete picture of its global business by connecting and accessing its customer and sales data.
- › Helps trading and sales teams to be more efficient, making sure that when they get alerts or have calls with customers, they all have a 360-degree view of the customer and tools at hand.
- › Enables key super users within the business to adapt and modify processes as needs change using the low-code tools.

To learn more about Xpedition visit: [xpedition.co.uk](https://xpedition.co.uk)  
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