



Digital CRM transformation at Defaqto with Xpedition and Microsoft Dynamics 365 CE

About the organisation

Defaqto is one of the UK's most trusted sources of financial products and market intelligence, supporting financial institutions, intermediaries and consumers to make smarter financial decisions. It maintains the UK's largest financial product database and uses proprietary research methodology to develop independent ratings, reviews, insights and technology.

Defaqto is part of Fintel, the UK's leading fintech and support services business. Operating at the heart of retail financial services, Fintel provides technology, expertise and insights to help the market operate more effectively and inspire better outcomes for all.

The Challenge

As Microsoft prepared to withdraw mainstream support for Defaqto's incumbent on-premise CRM system, CRM 2011, it became necessary to look for a replacement solution and a partner to help with its implementation.

"We needed a solution that would put the business in the driving seat for growth over the next ten years and a partner to help us understand the art of the possible with the new technology." Tom Whelan, Head of Business Operations at Defaqto.

Defaqto selected Microsoft Dynamics 365 Customer Engagement (CE), including Dynamics 365 sales and Dynamics 365 Customer Insights to support its sales and marketing operations.

Tom explains, **"Xpedition provides us with the scale and expertise needed to support a business the size of Defaqto. It also meets our requirements for a deep understanding of our market sector and industry. We were particularly pleased to have named individuals dedicated to us from the start of the selection process to the present day."**

Highlights

Smooth migration from on-premise to cloud solution for Defaqto sales, marketing and customer service operations.

Experienced and capable partner with a deep understanding of Defaqto's business and marketplace.

Increased efficiency through integration of CRM and ERP solutions.

Future proofing of Defaqto's business with cloud-based solution and scalability for growth.



Solution

Defaqto adopted a phased approach to the implementation of Dynamics 365 CE, initially deploying the solution to support its Sales team with opportunity management and Customer Support, providing ticket management for all

issues and queries generated by its customers. Subsequently the solution was rolled out to the marketing department driving email campaigns through the new solution, alongside an integration to the ERP system.

Working with Xpedition

"It's been great to have a partner that's engaged with the process. Xpedition has demonstrated excellent levels of expertise with the solution and a strong understanding of our business and the sector we operate in. We have built a great relationship and it certainly makes a big difference when you enjoy working with people!"

Tom Whelan, Head of Business Operations at Defaqto.



The digital transformation has revolutionised the sales administration process, by eliminating the need for re-keying opportunity data into a separate application on conversion to orders. Orders are now fed automatically through to the organisation's ERP system, reducing manual effort and risks of errors. The business now has real-time visibility of the sales pipeline, integration across the organisation via Microsoft Teams and improved reporting through Dynamics 365 CE dashboards.

Tom continues, **"Xpedition helped us to avoid potential pitfalls when designing the solution, ensuring we focused on using CRM for its primary function and avoiding unnecessary customisation of the product. We kept it as out the box as possible, which will benefit us hugely in the future when we come to apply upgrades."**

Dynamics 365 CE also brings all the benefits of a cloud solution to Defaqto, removing the need for expensive on-premise hardware, allowing access from any location and providing a platform for future growth.

Since the go-live date a year ago, Dynamics 365 CE is now used by all the sales team, marketing, contracts and licensing management, finance and customer support. CRM has become the backbone of the organisation, driving efficiency and profitability across the business.



Benefits

Increased efficiency

Dynamics 365 CE has increased efficiency by removing the need for re-keying of orders into the organisation's ERP system, reducing manual effort and the risk of errors.

Dynamics 365 CE brings significant benefits, including easier maintenance, no need for in-house hardware and seamless future upgrades, protecting Defaqto as it grows.

Improved visibility of sales pipeline

Dynamics 365 CE has enabled real-time visibility of the end-to-end sales pipeline from initial customer contact, through opportunities, to sales orders, allowing better management of Defaqto's business processes.

Integration with native Microsoft platform

As a flagship Microsoft product, Dynamics 365 CE is easily integrated with a suite of applications, including Teams and Outlook, transforming CRM into the backbone of Defaqto's business.

Future proofing for Defaqto

Moving from an end-of-life, on-premise solution to cloud-based

To learn more about Xpedition visit:
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