



# Microsoft Dynamics 365 Sales transforming Sales and Customer Care at Shackletons

## About the organisation

Established in 1959, Shackletons is a family-owned business with a team of over 100 people supplying a wide range of quality furniture designed for the needs of the care sector. Its factory in Dewsbury builds handmade, upholstered sofas and chairs to customer specifications, whilst a range of bedroom furniture, dining tables and occasional furniture are produced in Leeds.

## The Challenge

The initiative to replace aging spreadsheet-based systems with a state-of-the-art sales system was driven by the lack of visibility for Shackleton's external sales teams.

**"Our sales teams were hampered by the lack of information available to them when they were on the road, reducing their ability to respond to new enquiries, follow up leads and develop opportunities into sales orders. We needed a solution that would allow them to easily collect new information and join up the**

**engagements with existing and potential customers."** says Jade Cox, Head of Customer Care at Shackletons.

Shackletons undertook a rigorous assessment of various offerings in the market, settling on Microsoft 365 Dynamics Sales, largely because of the approach adopted by Xpedition during the selection process. Xpedition ran several workshops, involving the Head of Sales and other senior sales staff to understand Shackletons business model and specific needs. Jade explains, **"Xpedition really listened to us and**

## Highlights

Rigorous discovery of business needs during selection process

End-to-end Sales processes supported by Microsoft Dynamics 365 Sales

Full adoption of new solution by sales and customer care teams for leads and opportunities

Leverage of Power BI capabilities to deliver accurate and timely financial forecasts

Visibility of sales pipeline and customer interactions by mobile sales teams

**demonstrated functionality that was relevant to our business. They were very supportive, even giving us a test environment to explore what the solution could do for us."**

## Solution

Shackletons implemented Dynamics 365 Sales, going live towards the end of 2024. Currently the system is used to support sales leads and opportunities, as the first step on a journey to roll out the full solution. The full sales and customer care teams are using it daily to manage their sales and opportunity pipeline. An early win was the development of a Power BI report in CRM that includes all outstanding sales orders and 5 years

of historical data for customers, so that sales teams on the road can access this data without having to return to the office to interrogate the ERP systems.

**“Our commercial director is also armed with much more data than before, using the solution to produce forecasts for board and bank meetings, so its rapidly becoming an invaluable tool for the business,”** says Jade.

Missed opportunities are now a thing of the past as sales have all the interactions with a customer at their fingertips, wherever they are, and can proactively manage their relationships with customers and leads from initial contact through to orders and delivery.

Jade continues, **“We even record things such as dietary requirements so that when our customers come and talk to us, we provide the right refreshments, which they are very impressed by. It’s all about the customer experience.”**

Dynamics 365 sales provides a single repository of information about a customer or lead, giving full visibility of all interactions with Shackletons, detail of the sales pipeline and financial forecasts. The board now has full confidence in the data, enabling them to better plan the business.

**“We are also able to analyse any lost opportunities and categorise them by reasons such as price, product or lead time, helping us to improve our customer care all the time,”** says Jade.

Marketing campaigns have also benefited from the enhanced, high-quality data within Dynamics 365 Sales, enabling more precise audience targeting.



## Working with Xpedition

**“We couldn’t have asked for anything more from our team at Xpedition. We had lots of questions, and they have always been on hand when we’ve needed them. They are happy to jump on a call and talk us through any issues we’ve had and figure out a solution for us.”**

Jade Cox, Head of Customer Care at Shackletons.



## Benefits

### Increased Visibility

Shackletons’ sales and customer care teams now have full visibility of sales pipelines and customer interactions from any location, enabling a higher level of customer experience and lead conversions.

### Improved Management Reporting

Shackletons’ Commercial Director is able to incorporate sales data into key reporting to the company board and other stakeholders, providing trusted forecast data for business planning purposes.

### Access from anywhere

With its cloud-based architecture, Microsoft Dynamics 365 Sales gives sales and customer care teams remote access while simplifying maintenance and upgrades for Shackleton.

### Single Source of truth

The replacement of legacy spreadsheet systems means Shackletons now has a single, trusted source of sales and CRM data within the business, enhancing business planning and performance.

### Future proofing

Dynamics 365 Sales provides a solid platform, enabling further rollout of functionality and automation to support growth at Shackletons.

### Better marketing campaigns

The improved and more comprehensive data in Dynamics 365 Sales has already improved marketing campaigns at Shackletons, targeting the intended audience more effectively and efficiently.

To learn more about Xpedition visit:  
[xpedition.co.uk](https://xpedition.co.uk)  
Or contact us on +44 (0)20 7121 4705

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