storm technology

CASE STUDY

Windsor Motor Group

Unlocking Growth Potential with Dynamics 365

Windsor Motor Group Future-Proofs Sales & Marketing with Best in Breed CRM Solution Dynamics 365

Established in 1964 Windsor Motor Group has grown from strength to strength, with the groups reach totalling 24 dealerships across Dublin, Galway, Wicklow, Louth and Meath. Recognised as a trusted motor distribution and servicing provider, Windsor's success can be attributed to its ongoing commitment to the delivery of sales and service excellence combined with the strength of the customer relationships developed.

To further strengthen customer relationships, re-enforce processes and enhance reporting across the group, Windsor embarked on a digital transformation journey. One that would see them introduce a modern Customer Relationship Management (CRM) solution, one that could not only meet their existing requirements but future requirements in the years to come.

The on-premises legacy CRM solution, that had served the business well for almost sixteen years had begun to present blockers for future development, with the system incapable of offering the depth of integration required for the e-commerce and telephony systems the business believed would support future growth.

Future-Proofing the Sales Process

To address this challenge the business embarked on an evaluation process to identify the right fit solution for their current business needs. During the RFP process the team met with Storm Technology, a Microsoft solutions partner who were able to demonstrate how cloud-based CRM solution, Dynamics 365 (D365) could deliver upon their existing requirements while offering the flexibility for future customisation and system integrations. Central to this suitability assessment was the ability to integrate with the existing Dealer Management System, a business-critical solution that manages the journey of the vehicle from purchase to after care and parts.

Speaking on the project Enda Martin, Head of IT at Windsor stated, *"Once selected as the preferred business partner, Storm worked with us to define our existing processes. While we had ambitions to enhance and build upon our existing processes, we were mindful of the potential impact a change in technology combined with a significant step-change in processes could have on our team. With Storm we were able to replicate our existing processes, integrating with our Dealer Management System and further customising the CRM solution to align with our existing processes, rather than changing the processes that already worked for our business to fit with the technology. In addition to process mapping, Storm supported the development and execution of our data migration strategy, a business-critical activity made even more challenging due to the large volumes of data held.*

We were aware from the outset that user adoption could prove challenging, as historically paper-based quoting was commonplace. Shifting the mind-set from "my leads" to "business leads" was essential to ensure success. As a result we worked with the team at Storm to bake controls into the system, adjusting permissions to enforce the approved processes which combined with internal communications. Evangelising the importance of data for future growth really helped us overcome user resistance and ensure the quality and reliability of system data.

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> Windsor Motor Group

An Integrated Solution Designed to Scale

Designed to support growth, the D365 solution once adopted by the users was then evolved as the business needs changed. Where the legacy platform struggled to support integrations, D365 offered seamless integration to the new phone and e-commerce system. Speaking on the solutions ability to adjust to the evolving business needs Martin stated *"With D365 we have a best of breed solution, we can quickly and easily leverage customisation and integration capabilities to grow the solution with our business. Rather than create a brand-new API to integrate with third party platforms and sites such Carzone and Done Deal, the team at Storm recommended the use of a parser, something which has proven an invaluable tool for our business.*

With improved transparency across the entire sales process, from lead through to invoicing, the new solution provides our management team with greater visibility across our dealership network. We can now analyse sales data from across the organisation quickly and easily, enabling us to pinpoint potential opportunities or even to drill down to an individual dealership level to review performance."

In addition to enhancing the sales processes, the team at Windsor were to strengthen their customer communications using D365 native solution Click Dimensions. This marketing automation solution enables the marketing team to deliver personalised communications while ensuring full compliance with data protection legislation. With integrated reporting functionality, the Windsor marketing team can further build on success through the continual analysis and campaign optimisation.

An agile cloud-based solution offering instant access from any browser, once the right credentials have been provided, D365 combined with the adoption of Microsoft 365, enabled the team at Windsor to transition with ease to remote working in the face of Covid-19.

Supporting Long Term Success

A business-critical solution, Windsor took a long-term view of their D365 investment, opting to engage with Storm's support team. Speaking on this support agreement, Martin stated, *"With Storm we have settled into a very good support relationship. We have a dedicated account manager who understands not only the system but our business and processes. When we go to them with a question, they have the user and business knowledge to understand the business need, meaning we don't have to waste time explaining the importance of a change or the business complexities behind it.*

The support agreement has enabled us to continue to evolve the solution with our customisation requests now fielded directly through the support team." A dynamic business, that evolves continually to account for shifts in buyer behaviour and best practice sales processes, Windsor's on-going support agreement ensures their customer relationship management platform will continue to meet the business needs for years to come.

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> Head of IT
> Windsor Motor Group

Looking to strengthen sales and marketing processes while enhancing visibility across the customer journey? Click here to speak to a member of our Dynamics 365 team today!

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