



Don't just take our word for it...

Ingka Investments

THE STORY

Ingka Investments wanted to 'level up' their business by introducing Power Apps to manage their core operations.

This would replace an extensive set of spreadsheets with data held in PowerApps, and replace an older DMS Platform (ProjectPlace) with SharePoint and Office 365.

This was lead by their digital team who selected CRMCS based on their experience integrating SharePoint with PowerApps to meet their objectives. **Phase 1** started with a PowerApp for Asset Management and Contract Handling integrated with SharePoint for Document Management. This expanded into using Power Apps Portals to help manage Purchase Orders alongside Contracts, and use smaller Canvas Apps alongside the main Model-driven Apps.

Power Automate was then selected to help integrate existing SQL siloes of data with or into the Power Apps to increasingly bring a single data 'backbone' using the Power Platform. This is an ongoing project to add technology via the digitalisation team across Ingka's teams and bring 10 countries throughout Europe into the single solution to collaborate with 50 main asset sets.

Ingka had not previously used the Power Platform in their digital projects but were interested in the platform from their close relationship with Microsoft.

Ingka started the relationship with CRMCS based on one of our Webinars presenting DocDrive365 alongside the Power Platform – and selected our technology as a potential good method of replacing their dependency on Project Place with SharePoint and DocDrive365

FOUND CRMCS...

- ① **DocDrive365 to integrate the Power Platform with SharePoint and MSTEams**
- ② **SharePoint and Office 365 to replace existing DMS.**

THE TECHNOLOGIES

- ✓ Power Platform for model-driven Apps
- ✓ SharePoint and Office 365 to replace existing DMS.
- ✓ DocDrive365 to integrate the Power Platform with SharePoint and MSTEams
- ✓ Power App Portals to engage suppliers
- ✓ Power Automate to integrate data
- ✓ Additional Canvas Apps to engage suppliers and 3rd parties

THE BENEFITS

Digital approach for the business over separate spreadsheets and different processes ✓

Unified technology approach across 10 countries and 50 assets ✓

Single set of processes for how data is stored and flows into the solution ✓

Shore Capital

Independent Investment Group

THE STORY

Shore Capital enlisted CRMCS to assist them in utilising Dynamics 365 Marketing to regularly engage investors and financial advisors with various funds and opportunities.

The marketing team were challenged with interpreting fund updates and investment letters in order to incorporate regularly produced portfolio PDFs into their marketing.

CRMCS were able to advise and set up Azure Cognitive Services to assist Shore Capital in meeting this challenge, allowing Dynamics to interpret incoming reports and associate them to the appropriate **investor contact records**. DocDrive365 was then used to store the reports in the correct SharePoint location. This enabled the reporting team and marketing team to collaborate more effectively on **investor relations**.

A key next requirement was to model a fund's expected performance and produce it as an illustration for **advisors or direct investors**.

CRMCS directly implemented this **Fund Modeller within Dynamics** to plot the expected performance based on a variety of static attributes of the fund as well as dynamic attributes of a potential Investment.

This made use of Azure as our Logical Modeller, which was integrated into Dynamics via TypeScript Development.

This could then be linked to Power Automate to generate the model as a PDF, store these reports in SharePoint via DocDrive365, and send to the Advisor or Investor as a Real-Time Marketing Event in Dynamics 365 Marketing.

FOUND CRMCS...

- ① Shore Capital were existing users of Dynamics 365 for Fund and Investment Management, and found CRMCS for our experience with Dynamics 365 Marketing.
- ② This expanded in the Marketing Team based on our DocDrive365 expertise for SharePoint and Cognitive Services.



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THE TECHNOLOGIES

- ✓ Dynamics 365 Marketing
- ✓ Azure Cognitive Services for intelligently handling reports.
- ✓ SharePoint for report storage
- ✓ DocDrive365 to integrate Dynamics, SharePoint and Cognitive Services into a single solution.
- ✓ Power Automate and DocDrive365 for modelling report production

THE BENEFITS

- Engagement-based marketing to 10,000 key investors ✓
- Processing 500 reports and investor letters each month to automatically associate to the right Investor and empower the marketing team ✓
- Model fund performance in Dynamics and allow 3rd Party IFAs to produce **Fund Illustration Guides** ✓

UAE Investment Organisation

THE STORY

This Investment Bank was building Phase 2 of their PowerApps implementation in order to connect new businesses and high-net-worth individuals with their investment and networking teams.

This involved using Power Apps Portals to allow these businesses and individuals to engage online. The Bank faced a challenge in sharing documents between PowerApps, Portals, and SharePoint while maintaining the appropriate level of security and development ease.

To address this issue, the Bank's Team hired CRMCS to implement DocDrive365 and use our technology to manage documents correctly and securely.

This was a large project spanning 6 Environments in 2 tenants – and so involved the CRMCS Team connecting with an existing development team to add the DocDrive365 App into the other workstreams taking place. From this engagement, the bank client's can raise new requests via Power Apps Portals and attach the required documents via DocDrive365.

This allows documents to be categorised and populated with Metadata to help the bank's staff to complete the requests, and segment the documents in SharePoint so only the right team in the bank has access to the relevant documents so good 'Chinese Walls' are maintained between the bank's internal teams.



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FOUND CRMCS...

- ① PowerApps Portals for Engagement Online
- ① Found CRMCS based on our experience with integrating SharePoint with PowerApps and Portals.

THE TECHNOLOGIES

- ✓ PowerApps Portals for Engagement Online
- ✓ Found CRMCS based on our experience with integrating SharePoint with PowerApps and Portals.
- ✓ Used DocDrive365 as an Azure App hosted in the Bank's region to manage communication between the Portal App, the Power App and SharePoint.

THE BENEFITS

- Launching a new investor portal ✓
- Replacing separate processes for different types of request with a single core flow from Portal to PowerApps and SharePoint ✓
- Single security and business approach ✓

Fenwick Elliott

THE STORY

Fenwick Elliott had a common problem when looking at organisational IT – an older web application using a standalone SQL database that had fallen outside their wider IT strategy.

The challenge was to replicate the application and database in a more supportable form that met modern IT requirements for Security, Search and User Interface.

Fenwick Elliott had an existing use of the Microsoft Cloud and so could rebuild the application as a new Model-driven PowerApp.

CRMCS helped Fenwick Elliott build, test and launch the new App – ensuring that all legacy data was migrated and secured.

This allowed new Apps to be developed that orbit around the main Dynamics-based CRM as way of using the Microsoft Platform in small itemised ways alongside larger CRM requirements.

FOUND CRMCS...



- 🎯 Fenwick Elliott enlisted CRMCS based on our experience with Dynamics and the Power Platform after meeting us at an industry event.

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THE TECHNOLOGIES

- ✓ Power Platform for Model-driven Apps
- ✓ CRMCS data migration tools to move existing data from SQL to the Microsoft Cloud
- ✓ Power automate approvals to connect users to the App over email

THE BENEFITS

- Updated a legacy App into the Cloud to fit compliance and the IT Strategy ✓
- Improved access to information to remove siloes ✓
- Enabled as a mobile App ✓
- Allowed older IT Equipment to be retired to save costs through a single platform ✓



Money Penny

THE STORY

Money Penny work with a large volume of businesses across the UK and the US for professional services and digital offerings.

Money Penny selected Dynamics 365 to handle their New Business Sales and approached CRMCS for their Dynamics Services expand into the Cloud, Account Management and Marketing.

As Money Penny work with approximately 12,000 businesses at any one time, they have a churn rate between new customers and terminating customers.

CRMCS and Money Penny have worked together to deploy a new aspect of the Microsoft Power Platform, the AI Builder, to create a Machine Learning Model that can predict how likely or unlikely an Account is to churn based on their existing data.

CRMCS configured this Model using the AI Builder alongside Power Automate and our OverTime Processes – this retrains the Model daily based on key Customer and Operational metrics, and then updates each current customer with a potential churn classification.

This was aimed at connecting the AI Model to the intended Business Processes using Power Automate and Azure Webservice – to the objective for CRMCS to provide the services that allow Money Penny to leverage AI from Microsoft and strengthen their Account Management as a result.

FOUND CRMCS...



- ① **Money Penny started working with CRMCS to help improve their use of Dynamics 365 for Sales and Marketing.**
- ② **Based on this existing relationship, Money Penny approached CRMCS to investigate and build a Model to predict Client Churn.**

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THE TECHNOLOGIES

- ✓ Dynamics 365 for storing Sales and Marketing data in the Power Platform
- ✓ Power Automate to bring operational data from the back-office into Dynamics for analysis
- ✓ Power Platform AI Builder to construct and test the Prediction Model.

THE BENEFITS

- Allows Money Penny to predict and report on the likely rate of churn for **account management forecasting** ✓
- Provide a highlight report when an existing customer account changes in it's predicted retention or termination ✓
- Allow **account managers** to identify a problem and step into an account before its too late ✓
- Enables stronger forecasting for future planning in the business ✓
- Uses the best new technology for **predictive learning** within the **Microsoft Cloud** ✓





DocDrive365

links documents to dynamics

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