

# M4 Systems Case Studies

## Logicalis

# M4 Systems Customer Solution - Logicalis



## Logicalis Connects People, Information and Processes Using Microsoft Dynamics GP, CRM and a Custom Quote Tool from M4

### Overview

Country or Region: United Kingdom  
Industry: Technology – Information and Communications

### Customer Profile

Logicalis is an international provider of integrated information and communications technology (ICT) solutions and services.

### Business Situation

Following a period of strong growth, Logicalis identified the need for a new CRM solution that would track all customer requests from initiation through delivery. The solution had to integrate with the existing Dynamics GP ERP solution and manage the large volume of complex customer quotes.

### Solution

M4 implemented a fully integrated solution incorporating Microsoft Dynamics CRM, Microsoft Dynamics GP, Advanced Recurring Billing and a custom quote tool for Logicalis.

### Benefits

- Increased business insight
- Increased productivity
- Reduced operating costs

*“The project as a whole was delivered on time and under aggressive timeframes – M4 pulled it out of the bag, they did not disappoint.”*

Natasha Towns, Business Applications Manager, Logicalis UK

### Situation

Logicalis is an international provider of integrated information and communications technology (ICT) solutions and services founded on a superior breadth of knowledge and expertise in communications & collaboration; data centre; and professional and managed services.

With its international headquarters in the UK, Logicalis Group employs over 1,900 people worldwide, including highly trained service specialists who design, specify, deploy and manage complex ICT infrastructures to meet the needs of over 6,500 corporate and public sector customers. To achieve this, Logicalis maintains strong partnerships with technology leaders such as Cisco, HP, IBM and Microsoft.

Following a period of strong growth and a number of acquisitions, the Senior Management team at Logicalis UK Ltd initiated a project to review all major applications and improve upon processes across the business. As part of this review, it was identified that there was a need to replace the current CRM system to track all customer requests from initiation through delivery.

Prior to the systems review, Logicalis used Sage CRM and CommuniGator to manage the sales pipeline, and email marketing campaigns, Microsoft Dynamics GP as the core accounting solution and an Excel based tool to generate customer quotations.

Stand alone applications, and the lack of integration between systems had resulted in duplication of work and data, insufficient visibility into customer communications and inefficiencies.

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Business Applications Manager,  
Logicalis UK

Natasha Towns, Business Applications Manager at Logicalis explained the issues the company faced. “The lack of integration between the different systems made visibility into customer communications difficult. Using different applications across departments meant there were no best practice processes in place or auditing capabilities”.

Key to the overall project and affecting all departments was the need for a solution that would manage an average of 1300 quotations the Customer Relationship Executives (CRE) were generating on a monthly basis. Logicalis generates quotes for multi-vendor solutions and services on a daily basis. Quotes can be complex - all go through a Technical Validation Process to confirm that what Logicalis supplies will meet the customer’s requirements and that all the necessary components are listed. If a customer requests a change to the quote, the revised quote goes back through the validation process to confirm the new configuration.

The Excel-based tool in place had been designed and adapted over four years. As Logicalis expanded and changed as a business, processes became more complex and the tool became difficult to support and expensive to maintain. Towards the end of its life, Logicalis was using 5 different instances of the tool to accommodate different aspects of the business. Towns commented, “We generate approximately 1300 quotes per month on average – on occasion up to 10 versions of the original quote can go through the validation process prior to sign-off. The lack of workflow and ability to monitor communications created a lot of email traffic with no way of effectively tracking the latest versions of quotes”.

The lack of integration between systems was also impacting the Sales and Management teams within Logicalis. Towns explained “The Sales team were only using Sage CRM in a limited capacity. The system did not integrate with other solutions in use, didn’t store or track emails and was not considered user friendly. The lack of centralised data made producing an accurate forecast extremely time consuming for the management team, so a more effective solution was required”.

## Solution

Following a full review of requirements, a decision was made to replace the existing Sage CRM and Excel quote tool with a new CRM solution that would manage quotations, customer support processes and provide the sales team with a user friendly solution for managing opportunities.

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The solution of choice had to be a fully integrated and centralised solution, which would meet the following business objectives:

- **Increase business insight:** tracking all customer orders and requests from inception through delivery
- **Increase productivity:** making it easier to do business with customers and suppliers
- **Reduce operating costs:** including cost per transaction
- **Improve sales forecasting capabilities**

When it came to software selection, Logicalis quickly identified Microsoft Dynamics CRM as a potential solution. Microsoft Dynamics GP (formerly Microsoft Great Plains) had been in use within the UK for the past 5 years and was also used in the US Head Office. Used to manage customer and supplier invoicing, the new CRM solution would need to integrate with the existing finance system.

On review, it was clear that Dynamics CRM could meet many of Logicalis's requirements using out of the box functionality. A full CRM suite with marketing, and sales capabilities, the solution provided workflow tools that streamline and automate everyday processes promoting shorter sales cycles, and the ability to deliver a consistent, efficient service that would enhance productivity. Full integration with Microsoft Outlook provided the ability to track all customer communications – and gave a 360 degree view of the customer.

Dynamics CRM also provided a highly customisable platform for further development – which became a must in terms of meeting their requirements around customer quotations. Towns explained "The quotes we produce for customers are complex. Solutions are made up of kit, services, maintenance and managed services, supplied by both Logicalis and a number of different partners, with different pricing models. The quote tool had to be very intelligent to cope with this - we realised that no one „out of the box“ solution was going to meet our exact requirements and customisation would be required”.

Having identified Microsoft Dynamics CRM as the solution of choice, Logicalis began the process of selecting a partner to deliver the solution and issued an Invitation to Tender to a number of partners in the Microsoft channel.

M4 Systems had been a partner of Logicalis for 12 months, providing support, consultancy and further development of the Microsoft Dynamics GP solution in place within the organisation. Following a series of meetings with potential suppliers, the company was selected as Logicalis's partner of choice for the CRM project.

Towns explained the reasons for selecting M4 Systems, "M4 had proven success within Logicalis. When we moved the support of our Dynamics GP solution to them, the improvement in the level of service was both immediate and impressive. The support team were very easy to work with and were efficient in responding to and resolving our cases. The consulting team were professional, knowledgeable and went the extra mile – always looking at alternative methods of improving processes and meeting our requirements”.

M4's experience implementing and supporting Microsoft Dynamics GP and CRM was key in the decision to move forward with the company. It was however M4's proven ability in further developing Microsoft Dynamics solutions that secured their position as preferred partner. Via its dedicated in-house .Net Development team, M4 had already implemented its own Advanced Recurring Billing solution to manage Logicalis's recurring customer contracts on time and within budget.

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Towns continued, “M4 had proven experience with both Microsoft Dynamics GP and CRM and had already delivered a fully integrated custom solution for Logicalis, which was already providing a rapid return on investment. Their approach in scoping out our requirements and providing a solution for the quote tool was meticulous. We were confident M4 could deliver”.

Having selected Microsoft Dynamics CRM as the solution of choice and M4 Systems as its preferred partner, Logicalis initiated a project that would see the implementation of a new CRM solution, integration to Microsoft Dynamics GP and a custom Microsoft Silverlight quote tool - connecting people, information and processes.

## Benefits

Working to aggressive deadlines, M4 implemented Microsoft Dynamics CRM, integrated the solution to Microsoft Dynamics GP and Advanced Recurring Billing and developed a custom quote tool for Logicalis on time and within budget.

A Silverlight web-based application; the custom quote tool designed and developed by M4 allows the CRE's to generate accurate orders for customers using any combination of components. Kit list descriptions and pricing information are pulled in automatically from Dynamics CRM using the correct currency (USD, GBP or EUR) and allows Logicalis to manage margins and variants to standard pricing. Quotes, which can be over 600 lines long and include kit, installation, services, support and SLA information are automatically stored against the customer record within Microsoft Dynamics CRM, providing full visibility for the Sales team.

Using workflow capabilities, the Silverlight application allows Logicalis to progress quotes through to orders. When a purchase order is received and the status changes, the quote is passed to the Order Management team to place orders on suppliers and then to the Billing Team for invoicing directly from Microsoft Dynamics GP, which will again update the customer record in Dynamics CRM automatically, providing a full audit history.

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Towns commented “M4 has provided us with a user friendly and fully integrated solution which met a very complex requirement. The process of quoting for a solution and getting the information into GP had to be both slick and accurate. With kit shipping as soon as the next day, even the smallest error could result in a substantial cost to the business. The Silverlight application has been live since March 2010 and we have been benefitting from the new solution from day one. The project as a whole business. One central solution will streamline procedures, reducing the cost of sale through improved utilisation of resources.

When asked about the relationship between Logicalis and M4 Systems, Towns commented “M4 has provided us with an excellent service from day one. The successful completion of a second, very high profile project has only increased their credibility within the business. The quality of their consulting team and their in-house development team is great! Nothing is too much of a problem; they have a very knowledgeable and professional team”.

On the custom quote tool, Tricker commented “For such a complex project to work and under tight time-scales, M4’s understanding needed to be extremely good and the design document very clear. The team quickly grasped the concept of what we were trying to achieve, as well as the full complexity of the quote tool’s functionality, pricing model and formulae. Not only did M4 rise to the challenge, they exceeded very high expectations along the way to a successful delivery.”

## M4 Systems

M4 Systems is a Gold Microsoft partner focussing on Microsoft Dynamics finance and accounting (ERP), Dynamics CRM and custom development solutions.

An internationally recognised ISV, M4 has a dedicated in-house development team offering customers the flexibility and capability to deliver rapid, cost-effective, integrated and sector-specific solutions.

## For More Information

For more information about M4 Systems solutions and services visit: [www.m4systems.com](http://www.m4systems.com)