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The Journey to Business Transformation

Searching for a better way to support customers

Professional services firm BDODrive was looking for software to help it manage its customers, what it found was a whole new way of doing business that transformed the company from the inside out.

BDODrive has been very successful in attracting new clients to its outsourced accountancy services. However, the firm started to realise that there were some gaps in how it supported those clients.

Rebecca McClure, Director of Operations for BDODrive, says: "We were experiencing some problems making sure we could support the clients as we went through our sales process with them and it was equally as important that we could continue to support them and meet their needs."

The professional services world is growing ever-more complex and, as a result, BDODrive's advisers were increasingly specialising in niche areas. The management realised that BDODrive's clients wanted this specialist advice but also continued to want a joined-up service. It needed a way to offer multiple services to clients, but the client needed to be able to see the overall picture.

Mark Sykes, Head of BDODrive UK, explains: "That's where technology really plays in because technology brings that expertise back together to give a joined-up service that still allows individuals to focus on their areas of expertise."

An examination of the customer journey at BDODrive highlighted where the gaps in service provision were, then BDO considered which people, technologies and processes it would need. BDODrive looked at a number of different solutions, including configuring its own system and looking at bespoke solutions elsewhere.

Mark explains: "We needed a flexible system, but at the same time we also needed that certainty around

security and where the data was going to be hosted and we needed certainty around the quality of the development of the product. We felt that going with Microsoft gave us that confidence of going with a platinum-rated business in terms of the product we were using, and it gave us confidence around the data and the security within it. It also gave us the flexibility to configure it to meet our business needs."

"We actually started off looking at a SharePoint portal to help us," Rebecca admits. "Some very kind person at Microsoft told us that Dynamics 365 CRM is what would actually serve us best."

Who are BDODrive?

BDODrive is the largest outsourcer of accountancy services in UK, with 5,000 employees who bring in £46 million of fees, and an annual revenue of £6 million. It operates from 17 locations in the UK and is a member of the BDO global network of public accounting, tax and advisory firms, covering 163 countries.

Building technology based on desired business outcomes

BDODrive chose ANS to help it implement Microsoft Dynamics 365 in the business. Rather than just installing software and training staff, ANS uses an outcome-based methodology to ensure that Dynamics 365 is



tailored to focus on the results that the business really wants to achieve with the software.

Mark explains: "At the outset of working with D365, we had a clear understanding of what we wanted in terms of behaviours and how things were going to work. But, as we understood more and more about it, what ANS really helped us with was keeping focused on the real outcomes that we could deliver through the business."

BDODrive wanted Dynamics 365 to help it to achieve three main outcomes:

1. Keep its current clients happy and engaged
2. Attract more clients and win more work
3. Gain more revenue from existing clients by cross-selling and upselling

Rebecca says: "What was brilliant was our partner actually sat us down and made us quantify what they (our business outcomes) looked like. They looked at what the state was today and what we wanted to achieve going forward with it. We looked at what data we had at the moment and then how we could quantify what success looked like."

BDODrive felt that, to achieve the greatest benefit from Dynamics 365, it was really important that the solution was owned by the business and not just the IT team. This meant that working with ANS to implement Dynamics 365 was all the more important.

Mark explains: "I work in professional services, I am a business adviser, so I am not used to implementing IT systems. I have to admit that right at the start we were a little confused about how this would work for us. How in this time frame are we going to implement this? We effectively, in a leap of faith, had to trust that ANS would do that for us."

Go-live is only the start of the story

Designing and implementing the software was really just the start of the journey for BDODrive. For Dynamics 365 to work for the business in the optimum way, it needed the data from everyone who had access or the insights gained would not be meaningful.

Rebecca says: "Configuring a system – easy! Getting people to actually adopt it, use it and use it in the way you really want them to, that is really difficult. Software is just software if you have not got anybody using it."

Mark agrees: "You can put the best system in the world in front of people but unless you are working with people about how they are going to use it, how they should use it, the benefits they are going to see and also setting the right tone from the top in terms of adoption, you are not going to see that actually become a reality."

Getting staff on board with Dynamics 365 was key. Within the firm, different teams needed to understand how Dynamics 365 could help them. ANS held monthly calls after go-live, asking the project team to discuss how people were using Dynamics 365 and to share ways to encourage adoption.

Rebecca says: "It was really useful to have somebody that was independent to us on that phone to shepherd that process."

She found that most teams had a "light-bulb moment" when they saw how Dynamics 365 could help with a specific issue. "So, for instance, if the team was experiencing a problem with seeing where all their work was, when we showed them how Projects worked and how they could manage a work flow, that was brilliant," she explains.

Rebecca's top three tips for user adoption

1. Don't think it is going to happen overnight. It is a process and it takes really hard work. You need to think about it over a sustained period of time and keep going at it from all angles. It is not just about training people; it is about change management.
2. Get some really good stories and some advocates for the solution. If you can get some stories with a very clear result, that will really help to get people onside.
3. Understand the teams' pain points. What are they experiencing? What are their difficulties at the moment? Then work out how the system can help address these.

But the biggest factor in adoption was when individuals started to see how they could take ownership of Dynamics 365, by understanding how they could take control of their data, use the data in ways that helped with their work and create their own dashboards to help them make the best use of the data.

"It changes the whole way that they interact with the system", Rebecca explains. "They become advocates for it overnight. They push all their teams to get involved with it. They then want to tell other teams to do it. What has been instrumental for us is getting some of those first adopters, who have had those light bulb moments, speaking to the rest of the teams to get them to be advocates for it, rather than us in management having to force the system on them."

The first 12 months: flexibility, agility and continuous development

The first 12 months since implementation have seen BDODrive continue on the journey of transformation.

The business has used Dynamics 365 in many areas from work flow to marketing to operations. Over the 12 months, BDODrive has also used the solution in ways it did not originally anticipate.

Mark explains: "What we found is there is a whole raft of data we didn't even think we would get. We have been able to watch whether people have taken part in surveys or engagement. We've been able to track the last time clients were contacted and how many conversations our teams have had with their clients. You can run data on anything that goes through the system. But what we are finding is that it is actually thinking about what is it I need to know?"

"When we kick around ideas about what we would like the business to do or how we would like to engage with our clients, our default position is now 'oh let's see if we can do that using D365?'"

As a result, BDODrive has spun out challenges for the teams in terms of adoption, engagement campaigns for clients when the firm has sponsored events and they have run whole campaigns through the system and worked out engagement from the targets.

Other developments over the first 12 months have included the introduction of customer portals. These were not part of the original scope of the Dynamics 365 project. But, as BDODrive's understanding of the system expanded, it became something it saw could really help its clients.

Rebecca explains: "As we started using Dynamics, we thought actually it would be brilliant for the client to be able to interact with us and the CRM. So, we then engaged with ANS to implement a client portal."

Both Mark and Rebecca agree that one of the real positives of working with ANS as a partner is that it has enabled BDODrive to implement many of the changes and developments itself, without the need for new engagements.

Rebecca explains: "ANS enables you to own your own solution. They trained up our team to be able to understand how the solution was designed and then how to take it to the next level. You actually reduce your dependency on your partner. But they are still there on the end of the phone to support when something comes up that is a bit more complex or when you have got a new requirement."

Mark agrees:

"With the best will in the world, you're going to set requirements at the start and then a year down the line you're going to sit there and say but I would also like it to do the following. The ANS approach has really helped us to continue to be agile using the system and that agility has led to the adoption and the benefits through to the business."

Total transformation of the business

Dynamics 365 has not just had an impact on how BDODrive manages its relationship with its clients, which was the original impetus for implementing a CRM system. It has also helped to transform the business itself.

Mark explains: "We spent a lot of time building dashboards that were the key metrics of driving our business forward, not just pure financial metrics, but what does 'good' look like and then using the system to drive those statistics through. And then enable people to adopt the change we needed from them."

"We were able to encourage the right kind of behaviours and we were able to track that through the system."

Rebecca agrees: "We can also see information in there about which offices are more profitable, it is helping us manage the KPIs and performance of all of our people in the stream, which is brilliant."

BDODrive is also able to leverage the data to help with management-level decision-making, from decisions about where recruitment needs to be targeted, to investment decisions, to decisions about how the website needs to develop.



Rebecca says: "From our perspective in management, it allows us to see a lot more about what is going on inside our business and get data about where we are winning, what is working, what is not working, what our teams are doing."

The abilities and the functionality of Dynamics 365 have led BDODrive to put it at the heart of its business and business development.

But it is not just Dynamics 365 that has had an impact on BDODrive's business. ANS itself helped BDODrive to transform in ways that it had not expected.

The implementation process approach taken by ANS, which involved a series of week-long sprints with new functions being installed each week, demanded that BDODrive focus on a new project each week, with clear results at the end of the week.

Mark explains: "I don't think we had been used to that speed of implementation. It wasn't some theoretical exercise and 12 weeks or 20 weeks down the line we were going to see something. We were each week seeing that functionality come to life for us. So, it kept us engaged, because it was real, but it also meant we had to be prepared to keep putting that time and effort in."

This led BDODrive to assess how it worked with clients.

Rebecca says: "We have tried to take bits about how ANS worked with us into how we work with our clients. Breaking it down into small deliverable units, keeping things agile, making people focus on the business problem. It has been really valuable."

But the ANS approach has also changed the pace at which the business works in general.

Mark says: "We realised what you could achieve in a week, so suddenly the whole business started to move at a much faster pace because we had been through that rapid development plan."

"Actually, we don't call it a CRM tool. We have named it BDO Core because it is all about that one-stop shop for managing our clients rather than just a customer records system," Rebecca says.

The results are in

BDODrive is now able to see the very real benefits of the transformation that has resulted from the

implementation of Dynamic 365.

When it comes to achieving the business outcomes outlined in the initial meetings with ANS, BDODrive is well on course. Rebecca says: "We are seeing more clients coming into the business and what is brilliant about that is that we know that all of our people are following a consistent sales process, so we can guarantee that they are following up in a way that we want them to.

"We know that our existing clients are having a consistent experience. We are rolling out portals to them so they can see what is happening and what data we have got with them. We are sharing information with them about work we are doing with them, which is really helping improve their satisfaction." If you put the performance improvements in figures, the results are impressive."

Mark says: "Over just the past 12 months alone, we have seen our revenues grow 15 per cent but our gross profit has grown 25 per cent. And that is largely attributable to the fact that we are able to adapt quickly, respond quickly to our clients. We have the ability to ensure people are doing what we need them to do. Management has been able to leverage up more. They have greater visibility around what is going on with their teams, which means they can actually look after more clients while still delivering excellent client service."

Building and expanding: the next 12 months

BDODrive is hoping to build on its success with Dynamics 365 as it expands the use of the solution.

Rebecca says: "The next 12 months for us will be really interesting. We initially only adopted Dynamics 365 within our business unit, which is about 300 people. Now, because of the success of that, it is going to be adopted firm-wide across the whole of the UK and all business streams, so about 5,000 people." And, as more people within the business start to use Dynamics 365, BDODrive hopes that it will lead to even greater growth in the business and its relationships with its clients.

Mark says:

"When I look at the next 12 months for BDODrive, clearly we are looking at growth and continuing to transform the way that we engage with our clients.

"We won't grow unless we are out with our clients, unless we are understanding their needs. And we are very much looking for the system to enable us to do that: to report, to record what we are doing and to then be able to share insights internally to help us to grow."

Why should you consider dynamic 365?

BDODrive has undergone a very real transformation over the past 12 months. It started by trying to find a way to join-up its service to clients. It has ended up with a CRM system at the very core of its business that is changing and improving the way that it works, the pace at which it works, offering a consistent, reliable and excellent service to its customers and improving the all-round performance of the company.

Mark adds: "If someone was sat on the fence right now wondering whether or not they should implement D365, I think what I would say to them is actually the evidence speaks for itself. When we look at the quality of what our teams are doing and we look at the way they are engaging with their clients, we have seen radical change."

Mark's advice to professional services firms working with D365

1. Don't limit yourself to what Dynamics 365 can do, because the system is going to show you lots of things you didn't realise about your business. Embrace it, embrace what it can do and enjoy the fact that you are going to get much more insight on your business. Don't limit yourself to purely marketing or purely sales.
2. Be realistic about adoption. Don't put a system in place if you haven't put the plans in place to ensure that your team is going to use it. If half your team choose not to use it, you're missing the data and your insights are not meaningful. Make sure you are investing time and repeatedly, consistently over time reinforcing that message.
3. Make sure that there are people in your team who really understand the system. We took on someone as part of this process who really understood how to do the development. The great thing about working with ANS was actually it wasn't about them doing everything and then giving us the product. They

equipped us to make changes, they equipped us to understand the product and equipped us to know how to use it.

About ANS

ANS are the UK's leading digital and cloud experts, dedicated to helping organisations to achieve their digital ambitions in the cloud and beyond.

Specialising in cloud, AI, data analytics, IoT and Microsoft Dynamics 365, ANS works with public and commercial sector organisations to provide the intelligence and insights to enhance services, empower end-users and improve business outcomes. Customers include: Staffordshire University, Salford City Council, ECP, Royal Brompton & Harefield NHS, Trustford and Salix Homes.

For more information visit ans.co.uk