

The background of the entire page is a dark, high-contrast photograph of automotive brake components. Two large, circular brake discs are stacked, with the top one slightly offset. Below them, two brake pads are visible, showing their dark, textured friction surfaces. The lighting is dramatic, highlighting the metallic textures and the circular patterns of the discs.

**Inciper**

## **CASE STUDY**

Inciper recently worked with the world's leading provider of parts cleaning, surface treatment, chemical application and waste collection services, with a field team of more than 500 in the UK and 1000 globally.

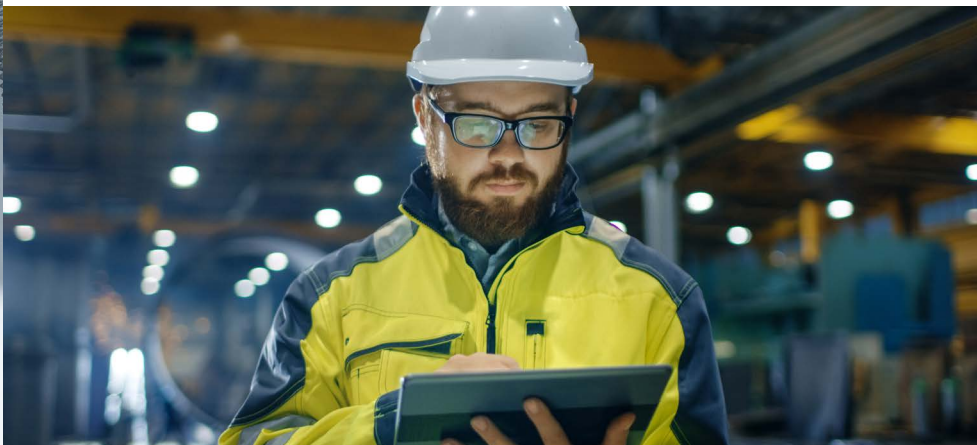


**The organisations board decided to undergo a digital transformation to replace legacy solutions, move from paper to digital mobile technology and standardise on a single common IT platform, underpinned by advanced data analytics.**

This ambitious plan included re-engineering processes and replacing in-house developed business application across its European operations coupled with a legacy version of Microsoft Dynamics AX, a highly customised on-premise CRM solution and a legacy FieldOne mobile application within the UK.

As a result, Microsoft Dynamics D365 Sales, Finance and Operations, Field Service and Customer Service supported by Power Apps and Power BI were selected.

To help the business undergo this transformation, they selected Inciper as their technology partner due to their RAPID agile implementation approach, Dynamics 365 and Power Platform expertise and collaborative approach to solution implementation.



## Key Challenges

Initially Inciper supported the CIO, the CFO, and the board in the definition of a group solution blueprint and roadmap for D365. Part of that roadmap was the immediate UK requirement to migrate from Dynamics CRM and FieldOne on premise solutions to D365 including Sales, Field Service and Customer Service capabilities in the cloud.

Firstly Inciper, as a trusted Microsoft partner, were able to extend the FieldOne platform usage, mitigating the immediate risk for the business staying operational. Secondly, address the current issues faced within the UK Team:

- Field Based Team struggle with usability of the current mobile application
- Poor scheduling tools
- Lack of functionality to support the Kleenwaste (waste collections) business
- Unreliable integration between CRM and AX
- Current solution not aligned to the Group Solution vision



# Inciper Approach

Inciper initially undertook a discovery phase to establish the scope and complexity of the UK solution footprint which was heavily customised, while at the same time exploring the wider European requirement for a group-wide solution.

As part of this process, working alongside the Microsoft Product team, it was quickly established that the only option was to undertake a re-implementation of D365 Customer Engagement including the Field Service capabilities.



## The Scope

The scope of the To-Be solution landscape was a complete D365 estate including:

- **Microsoft Dynamic 365 Sales** - CRM, customers, quotes, agreements, digital signatures, field based ordering, ancillary sales, new business and account management
- **Microsoft Dynamics 365 Field Service** - Field Service, work orders, engineer schedules, van loading / inventory management, barcode scanning, production of documentation including Environment Agency consignment notes
- **Microsoft Dynamics Customer Service** - providing Case management, customer service and complaints management
- **Mobile Service Power App** - Tailored hand-held mobility solution, providing sales and service teams with mobile and offline capability, including mapping, routing, photo capture and barcode scanning as part of jobs as well as mobile ordering and signatures. Field teams were equipped with stylus enabled, ruggedised, 8 inch Samsung Active tablets
- **Integration** - Updated and stable Microsoft ERP & CRM integration and integration to supporting systems leveraging Azure Logic apps for scalable, secure and stable integrations
- **Data & Analytics** - PowerBI based reporting and business intelligence, including statutory waste reporting as well as operational, sales and management reporting
- **Global Template** - definition of a global template and roadmap to future state to allow deployment of the solution to the organisations European offices, offering multi-currency, multi-lingual capabilities as well as providing for regional legislative and compliance differences

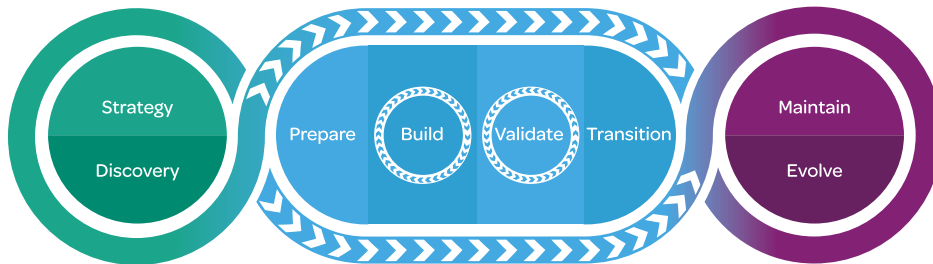


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## A RAPID Approach

The project was executed using Inciper's RAPID delivery methodology, an iterative approach based on agile principles but with added governance. Tools like Azure DevOps and shared Teams sites, combined with techniques such as daily stand-ups and sprint playbacks supported delivery of the solution to users within.



## Project Milestones

Delivery of the UK solution was completed using Inciper's RAPID methodology including a series of build sprints, detailed playbacks of the end-to-end solution and a formal testing process to ensure stability and accuracy for go-live. This approach helped to ensure validation of their requirements, suitability of the end-to-end process and the usability of the solution for back-office staff, branch staff and service engineers.

While running through the build and testing phases, Inciper were concurrently executing a complex data migration process taking the data from Dynamics CRM and FieldOne, transforming it and loading into the Microsoft Dynamics 365 cloud.

Following go live/post go live support the business transitioned the solution into Inciper's Managed Services operation who now provide 2nd and 3rd line incident management, ongoing continuous improvement and supporting the business through Microsoft Dynamics 365 cloud updates.

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# Benefits

## Key benefits of the delivered solution include:

- Harmonisation of processes, ways of working, financial reporting across UK Operations to enable effective performance analysis and consistent customer experience
- Consolidation of platforms across all UK operations enabling lower total cost of operation and easier to manage IT estate and ability to create operational 'centres of excellence'
- Improve Inventory Control to Improve stock visibility across branches and vehicles, improved utilisation of chemicals and machines
- 360-degree Customer Visibility to surface all activity across the whole customer base, improving customer knowledge to drive additional revenues through improved trend analysis
- Reduce Internal IT cost structure
- Transition to partner support for BAU through the project to release resources
- Improved automation of processes in UK to streamline user and customer experience, reduce paper use (costs saving and environment), consistent & more pro-active approach to customer contact, electronic signatures, and pdf delivery notes to improve auditing and reduce manual errors.
- Improved technical stability, meaning less system downtime and fewer errors across the estate
- Established solution blueprint and rollout strategy for expansion of the solution in

## Why Inciper?

Delivering business value through technology implementation is what drives us.

We help organisations, large and small, make the most from Microsoft technology and have a proven track record delivering results rapidly and efficiently.

**To learn more about Microsoft Dynamics 365 and the Microsoft Power Platform, the Inciper RAPID delivery methodology or our other clients visit please visit our website at [www.inciper.com](http://www.inciper.com) or email us at [info@inciper.com](mailto:info@inciper.com)**

