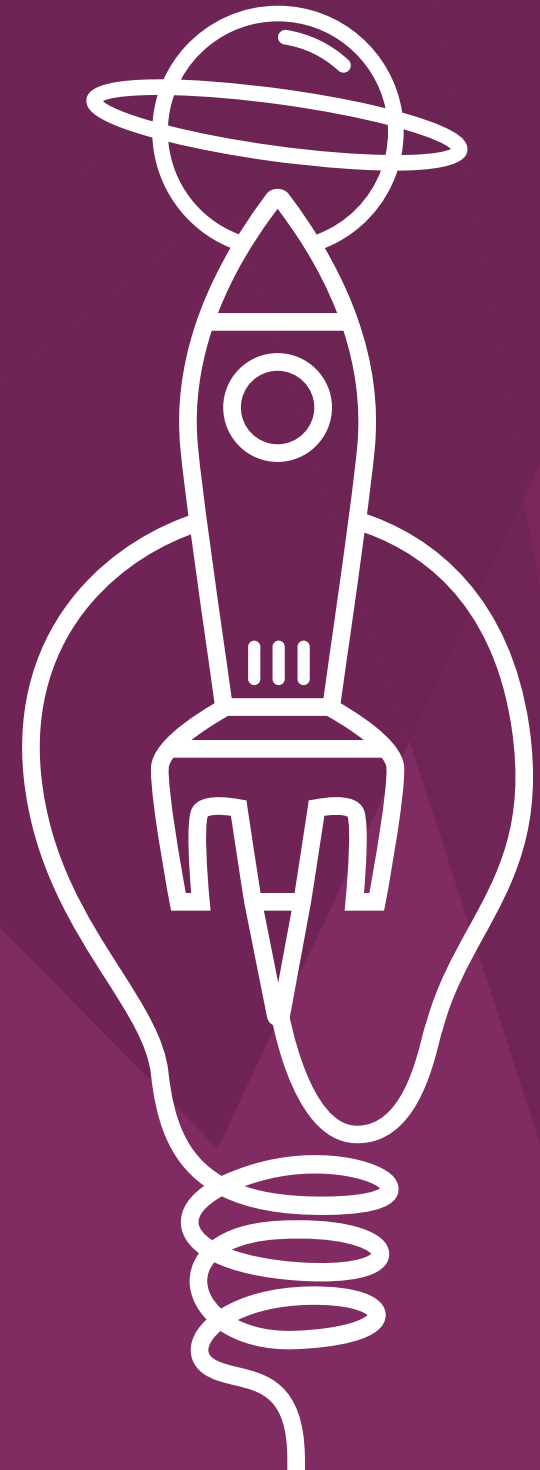


**Reimagining the  
business potential**  
of Davies Group with  
Microsoft Dynamics CRM



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# PROJECT OVERVIEW

Client:



Technologies Included:



Industry:

Operations, consulting  
and technology solutions

Country/Region

UK

## About DAVIES GROUP

Davies Group is a leader in the delivery of specialist operations & digital solutions across the risk and insurance value chain, including excellence in claims, underwriting, distribution, regulation, customer experience, human capital, transformation & change management.

With a 1,300-strong team, Davies handles more than 200,000 claims per annum; managing more than £1.5bn of annual claims spend. The company embraces disruptive thinking as part of its mission and looks towards new technology and innovation.

Entrusting SeeLogic as their advisors, Davies has implemented Microsoft Dynamics CRM across three divisions and built stronger client relationships, and drive cross-selling of its increasing portfolio of services with immense success. While keeping a relatively stable number of clients, at around 400, the company has grown by offering these clients more services.

## CLIENT QUOTE



Right from day one, I liked the way in which SeeLogic interacted with my team.

Eddie and his team were proactive, they listened but then they challenged us too. We could have had an inferior solution, or the right solution and SeeLogic ensured that we were taking appropriate strategic steps forward. The CRM which we have deployed is the start of a journey with Dynamics 365 and I'm sure as we adopt the wider tools available within Office 365 that our benefits will only continue to improve.



**Mark Grocott**

Chief Digital Officer, Davies Group



# CHALLENGES

#1

Davies Group has three divisions covering Claims, Insurance Services and Customer Solutions. It has expanded rapidly through both acquisition and organic growth.

#2

As part of this growth strategy, Davies wanted to identify opportunities across the different businesses with existing customers.

#3

CRM systems were being used across different businesses but there was **no single comprehensive view of customers** across all the businesses and divisions.

#4

Critical to the success of the technology implementation was the need to work as one team.



# OUR APPROACH

Davies group reached out to SeeLogic as part of an exercise to find a suitable consultant and implementation partner. They required to migrate quickly and SeeLogic impressed the brand in understanding their challenges and their practical approach at a rapid pace.



## Requirement Gathering & Product Selection

We carried out a thorough analysis and promptly concluded that **Microsoft Dynamics CRM** was the **best fit** for both their project requirements and the wider organisation without wasting any time.



## Business Process Mapping:

As the project kicked off, Davies Group and SeeLogic worked together **to map the detailed requirements** and again, SeeLogic impressed in how they **managed the process**. In particular, they **ensured that things didn't go off at a tangent** and worked in an efficient but effective manner.



## Implemented Communication Support for both teams

Critical to the success of the implementation was the **need to work as one team**. SeeLogic ensured excellent communication was a priority. Hence to achieve this, SeeLogic implemented **Microsoft Teams (an Office 365 tool)** which provided a centralised platform with dynamic view for both teams to collaborate and share valuable project information.



## OUR EXPERIENCE

"We have really enjoyed working with the Davies Group on this project. The project had clear business growth objectives for us to get behind. It was a classic CRM project looking to create that one clear and dynamic view of the customer across the company, with the end goal to drive added value both for customers and the business.

We were able to support this both with our CRM technical knowledge and our professional services experience to keep the scoping tight and deliver the project on time and on budget. Davies themselves are a progressive and innovative organisation with in-house digital and consultancy expertise, so it's a testament to the SeeLogic team that we have managed to match their standards and create a proficient level of customer satisfaction on this project."

**Lenny Khan**, Customer Success Manager

# PROJECT OUTCOMES



Client account growth through better understanding of customers with the power to upsell and cross-sell more relevant



Increased productivity and user adoption through development and roll-out of a client visit report PowerApp to capture the information remotely and populate back to CRM.



Unified team and better cross-team collaboration by providing a 360-degree view of the customers



## ABOUT **DOGMA GROUP**

**D**ogma is a group of companies helping you understand the fuller picture of cutting edge technology and implementing it effectively. This drives real outcomes around transformation, actionable insight, customer experience, and operational efficiency.

Dogma includes four specialist companies: SeeLogic, SeeLogic International, SiriusApp and DynamicAI. As single businesses, these provide focus and deep knowledge in their area of expertise: as a Group they provide integrated services offering you a greater breadth and bigger outcomes without the need for multiple suppliers and the challenges that can entail.

## TAKE THE NEXT STEP

Want to witness the power of Dynamics 365 Business Central for yourself?

### TALK TO THE EXPERTS

### **Dogma Group**, Your Trusted Advisor

Don't take our word for it, **call us today** on **01296 328 689** to arrange a no-obligation demonstration.

