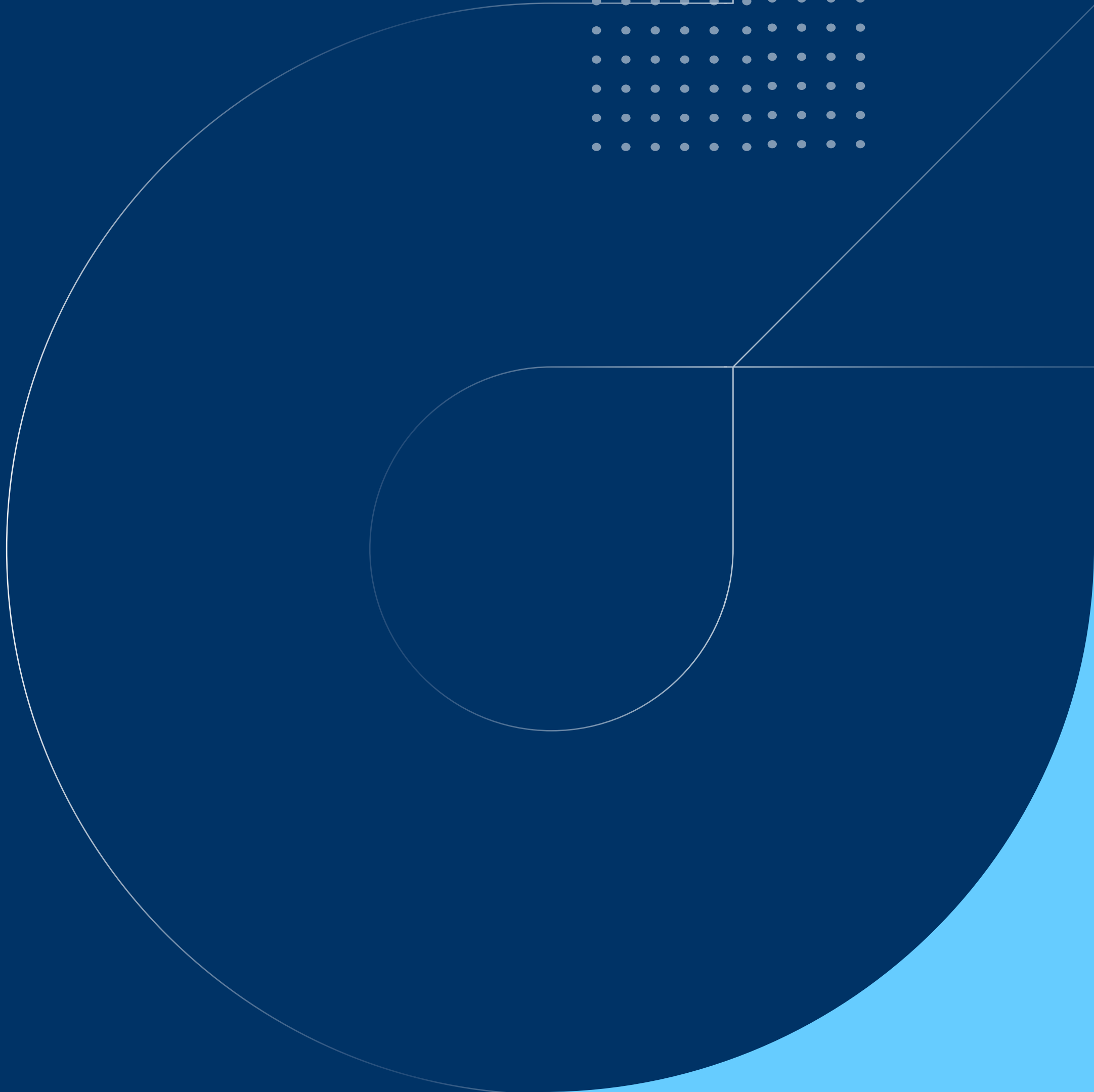
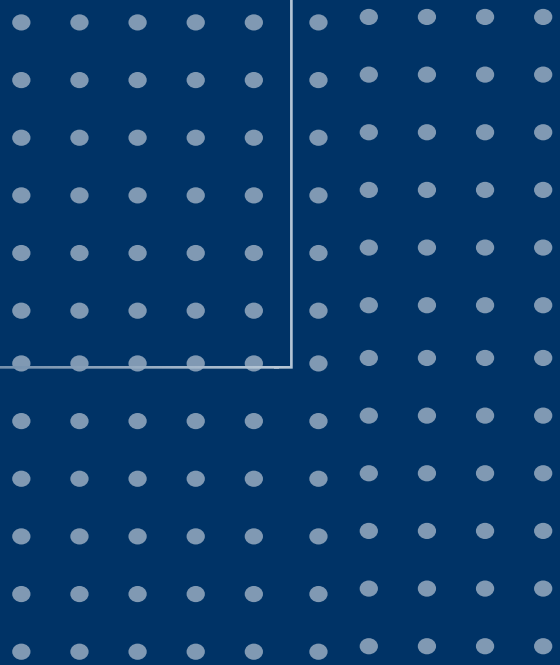




Reimagining the business potential of Davies Group with Microsoft Dynamics CRM

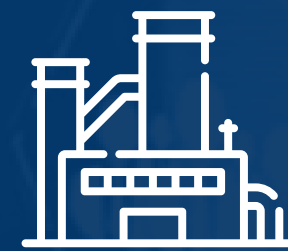
TABLE OF CONTENT

Project Overview	3
About Company	4
Challenges	5
Approach	6
Our Experience	7
Project Outcomes	8
About Dogma Group	9



PROJECT OVERVIEW

Client:



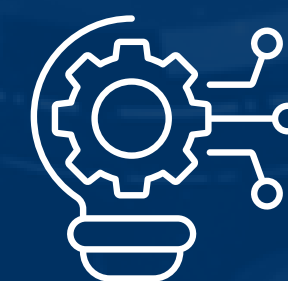
Industry:

Operations, consulting and technology solutions



Country:

The UK



Technology Included:



Microsoft
Dynamics 365



Power Apps

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 Dogma 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.



Empowering Newell Brands to centralise their customer service functions

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

Step #1: 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.

Step #2: Business Process Mapping

As the project kicked off, Davies Group and Dogma worked together to map the detailed requirements and again, Dogma 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.

Step #3: Implemented Communication Support for both teams

Critical to the success of the implementation was the need to work as one team. Dogma ensured excellent communication was a priority. Hence to achieve this, Dogma 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 Dogma 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, Dogma



PROJECT OUTCOMES

Business Benefits to Davies Group:



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



WHAT OUR CLIENT SAYS



“Right from day one, I liked the way in which Dogma 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 Dogma 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



ABOUT DOGMA GROUP

The Dogma Group is a progressive digital transformation company committed to delivering the digital imperative and becoming the most trusted advisor to its clientele.

In a hyper-connected world, with disruptive competitors and new business models we understand the need to deliver the digital imperative, i.e. fundamental action to adapt and remain competitive.

The Dogma group understands that each journey of digital transformation is unique for every client, and we ensure this through our philosophy of fluid transformation. Each solution is customised for organisations of all sizes, across industries and various life cycles. We innovate & strategize, create sustainable solutions, drive rapid returns on investment and create value from data.

Our passion for sustainability and its impact aligns us with the UN's sustainability goals and we actively encourage gender equality and diversity across our workforce.

TAKE THE NEXT STEP

Want to leverage our expertise for your next Project?

TALK TO THE EXPERTS

Don't take our word for it, [call us today on 01296 328 689](tel:01296328689) to arrange a no-obligation demonstration.



Transformations **with Trust**

We are committed to acting responsibly by integrating sustainability into every step of the business, including clients, partners' solutions, and the entire supply chain.



**Ready to embark on your
digital transformation journey?**



Let's talk

dogma consultancy

sirius app

dynamic ai

dogma international