



Birch Communications increases customer retention and satisfaction while boosting sales with Microsoft D365

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Executive Summary:

Birch Communications Inc. is a leading communications, network, cloud and IT solutions provider celebrating 20 years in business (1996-2016). Birch delivers cost-effective solutions that assist small, mid-sized, enterprise, and wholesale businesses to increase their productivity. Within the company, the Enterprise Communications Technologies (ECT) team was chartered with the responsibility to manage the telecommunications expense and reduce costs along with meeting the varying needs in the telecommunication industry.



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Process first. Technology second.

CHALLENGES

While focusing on telecommunications and financials; Birch Communications faced challenges; such as:

- Lack of Reporting in Finance, logistics, and point of sales
- Low customer service
- Increase in customer expectations
- Inability to track and capture e-commerce and telecommunication sales
- Redundant Data
- Lack of better data exchange and collaboration

These issues result in some of even the most successful communication networks operating on annual margins of only 1 – 3%. They realized that this could create a huge downfall in the company and wanted to replace their existing CRM system.

Resolving these issues increases efficiency and accuracy, increases sales, decreases costs, and creates easy and effective customer experiences.

SOLUTION

CRM for D365

- 200-user license of Microsoft Dynamic CRM
- System used to support calls and manage projects, as well as manage sales and customer retention.
- Case management provided an organized incident-based tracking for any issues with customers
- Case entity also allowed them to save time on customer issues and provide better customer service
- Leveraged Microsoft's PowerBI to optimize performance

Finance for D365

- More control and better ease at tracking and organizing company assets.
- Leverage Microsoft PowerBI to gain a more accurate view of historical data, real-time updates, a greater synergy between departmental data warehouses
- Ability to forecast and create trending information
- Real-time data updates helped spot trends, prevent issues and deliver great customer experiences
- Solution focused on key business processes like quotes, orders, invoicing, purchasing, cash management and reporting

RESULTS

As a result of using Dynamics 365; Birch Communications experienced:

- Increased productivity 17% through the use of CRM YOY
- Reduced costs by over \$3.5M in Operations, Sales and Marketing
- Reduced attrition by 7% and increased customer retention by 21%
- Case management closed over 200 cases the first month within the SLA without creating additional secondary cases
- Single case resolution resulted in the additional increase in customer satisfaction.
- Use the chat function to provide live customer service further driving down the cost of actual customer service reps
- Integrated systems provide intricate details on all methods of communications

“We can’t and should not celebrate our technology, the only thing worth celebrating is the success you have with our technology.”

- Satya Nadella (Microsoft CEO)