Harnessing their CRM data with Microsoft Power Platforms

When Scotwork needed a bespoke capability to generate data and present specific reports from their CRM system, they approached their long-term IT provider Chess. Scotwork wanted to identify sales trends and intelligence for their negotiating skills training courses among clients of different sizes across a range of sectors. To achieve this, they needed Chess to develop a process to extract data into a custom reports area from their CRM system.

Sector **Education**

People **200-500**

Solutions
Microsoft Power Platform

The project combined Chess's Microsoft Power Platform skills with Power BI alongside custom development work, all aimed at enabling Scotwork to harness their CRM data for targeted marketing campaigns.

Prior to the custom development element of the project commencing , Scotwork first needed Chess to help scope the requirement, document the deliverables, and develop the project plan.

The Business Challenge:

Scotwork provides interactive negotiation courses and consultancy that are designed to empower people and businesses in all kinds of negotiating situations. The aim is to help client organisations boost profits and strengthen relationships.

Find out more at **ChessICT.co.uk**

With over 300,000 managers trained across 40 countries, Scotwork's CRM system is a rich source of data and intelligence on what kinds of organisations have purchased which kinds of course for what reasons.

Robin Birrell's role in working with Chess was to develop a solution to create custom reports from the CRM system which would be used to inform streamlined sales and marketing operations.

The Solution

While Scotwork's CRM platform had been in place for a while, reporting capabilities were limited. This meant it was difficult, if not impossible, to obtain certain kinds of business reports that the company's management team needed to make strategic decisions.

For example, whenever the marketing team needed a new custom report for targeted marketing campaigns, they needed to issue a support request. This was an expensive and time-consuming process.

It was unclear to Scotwork how to go about scoping out a project to deliver these and other reports needed by the business. So they turned to Chess.

From previous IT project work, Scotwork knew of Chess's technical capabilities and in particular their custom development and integration skills.

Robin Birrell knew Chess could be relied on take a consultative approach, work with Scotwork at the right pace, gather the required information and put together a proof of concept.

This phased, collaborative approach was exactly what Scotwork needed. Rather than have a solution imposed on them, Scotwork knew that Chess would work with and alongside them, all the time focused on the end goal, yet fully understanding the context of the business need.

> **Chess worked with us to define and scope what we needed, they first made sure they fully understood our specific requirement before suggesting a way forward and delivering a proof of concept so we could see where we were going.**

Robin Birrell - Data and Systems Manager, Scotwork

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The Outcome

Robin Birrell likens the Chess approach to a 'journey'. *"By taking the time to understand where we wanted to get to, they were able to map out how the capabilities of Power Platform could be adapted to solving our problem".* The project enabled Scotwork to extract custom CRM data and make it usable and presentable, as well as to target sales and marketing more accurately. *"Our new CRM reporting capability saves us time and money because it is tailored to our specific business needs. It's a huge advantage over the slow and cumbersome system we had before."*

The Microsoft Power Platform project was delivered on time and on budget. By working in close partnership with Scotwork, Chess's project team and developers were able to deliver a bespoke CRM reporting capability that not only fits around the culture and business processes of Scotwork, but fits exactly with what was envisioned at the outset.

" The club benefits from the outsourcing of all our day to day IT operations, allowing us to focus on our key objectives. "

Robin Birrell - Data and Systems Manager, Scotwork

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Chess is one of the UK's leading independent and trusted technology service providers, employing 260 skilled people across the UK, supporting over 25,000 organisations.

By leveraging world-class technology, Chess helps you to connect your people, protect your data, grow your business, reduce your costs and work better together, which means your business, your people and your customers can thrive. At Chess, we're passionate about our unique culture and our continuous investment in our people to be industry experts.

We're extremely proud that our people voted us No.1 in 'The Sunday Times 100 Best Companies to Work for' list 2018, and we continue to celebrate more than ten years in the top 100.

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