



"Alletec helps UK based Savills migrate from On-Prem Microsoft Dynamics CRM to D365 Sales Online"

Overview

HQ: London, United Kingdom

Industry: Real Estate

Customer Profile:

Savills is a renowned name in the global real estate market. It is a 166 years old Global Real Estate company, with more than 39,000 employees and fully operational 600+ offices across 70 countries. The real estate company owns over 130 offices in the UK alone.



About Client

Savills deals with buying, selling, and renting nearly all types of properties, including residential, commercial, development land, farms, estate, and agricultural land. Their expertise lies in offering financial and investment advice, property valuation, planning, and property management.

Executive Summary

Savills APAC was using Dynamics CRM for its sales team which was implemented On-Premises. They had CRM version 2016 with different instances for different countries, including Singapore, Taiwan, Vietnam, Japan, and India.

In order to increase their employees' efficiency, their accessibility to data, ease of application maintenance, and reduce overall application costs, the company planned to migrate to a single Dynamics 365 Customer Engagement (CE) Online instance for all the countries. The objective here was to overcome the existing challenges of maintaining data integrity, higher cost, huge time consumption, etc.

Savills was looking for a solution provider who could address all these challenges. Alletec took care of all the issues that came its way by providing a proven solution and making the migration and future onboarding process super easy, cost-effective, and quick.

The Challenges

- The company was using different CRM Instances for different countries and with a different set of processes.
- Deployment process was cumbersome as the process required individual deployment for each country.
- Onboarding in a new country would need a completely new instance setup, which would lead to increased investment, effort, and time.
- Application Maintenance cost was huge. Common changes were required to be moved across all countries one by one
- The maintenance cost for Azure infra/application was huge.
- More complex data with a large number of records were raising data integrity challenges.

Alletec Solution

- Alletec followed standardization of processes using a Global Template approach.
- Alletec experts decided on a single instance in D365 CE Online.
- We used Microsoft LCS methodology to move the Master On-Premise instance to D365 Online. The Delta functionality from each country was then moved to this single instance one by one.
- All integrations were redesigned/upgraded based on current D365 CE Online requirement.



The Benefit

- Cloud-based CRM ensured accessibility, seamless connectivity, and ease of use for business users as well as owners.
- We enabled advanced reporting and dashboard capabilities, which are highly suggested for increase productivity. Single View for all countries was provided through CRM Dashboards to top management.
- Single D365 Online Instance accommodated all countries' processes. This approach helped the organization fulfill its need for rollup reporting, coordination, and sharing of information/data having process standards.
- Created UCI (Unified Client Interface) apps for each country-wise role, which enabled the application to run a country-specific process from anywhere, including web and mobile with a rich and responsive design.
- With the approach, Savills was able to achieve Rollup and Unified reporting, and cross-business unit collaboration. Hence, all their information, including historic data remained intact in the same instance's database without any need for additional integrations.
- Defining a Global Process Template reduced implementation and operational costs, as well as harmonize processes across business units and regions.
- Onboarding new countries became easier for Savills employees through the same Online instance.



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