

## Case Study

### Premier Advisory Group

Dynamics 365 and  
Marketing Implementation

premier 

#### Company Introduction

Premier Advisory Group (PAG) is a UK-based consultancy that works with multi-academy trusts to review and refine their approaches to development and growth, helping to deliver the best outcomes for all children in education. The organisation is built around a team of remote working, independent experts who see the big picture in the local context.



**15<sup>+</sup>** staff  
Company size



**20** users  
Solution size

#### Solution Components

- Mailbox migration from webmail provider to Microsoft Exchange Online
- Microsoft Dynamics 365 Customer Engagement Enterprise Edition
- Integration with Mailchimp email marketing solution using PowerMailChimp

Website: <https://www.premieradvisory.co.uk>

## Project Summary

PAG approached Strategy 365 to deliver a proof-of-concept solution for their demanding marketing database requirements, prior to delivery of the full solution. The initial challenge for PAG was that their existing prospect and customer data was captured over several large spreadsheets and unrelated marketing systems. This, compounded by the fact that the captured data was duplicated across these data silos, resulted in disproportionate effort being consumed managing the data and not providing services to their clients.

Following the successful delivery of the proof of concept based on Microsoft Dynamics 365 Customer Engagement, PAG commissioned Strategy 365 to deliver the full project. A key component to the success of the project was the migration of their existing webmail solution to Office 365, which allowed PAG to implement the seamless tracking of emails from within the users' Outlook to the Dynamics 365 platform.

The new system was designed to capture a single point of truth of the data required by PAG to manage their marketing objectives. This data requirement was met by importing all the existing data from the various spreadsheets to the new Microsoft Dynamics 365 CE platform while ensuring that duplicated data was flagged and managed appropriately.

A further requirement of the new system was to automate and manage the mass email marketing campaigns, by integration of Microsoft Dynamics 365 platform to the existing MailChimp platform. PowerMailChimp was implemented within the Microsoft Dynamics 365 solution to provide this requirement.

## Key Deliverables

- Migration and setup of all mailboxes and distribution groups from a webmail provider to Office 365.
- Single point of data truth, around thousands of clients, contacts and their associated emails and phone calls.
- Controlled marketing campaigns around defined segmentation criteria.
- Group-wide views around Campaigns, resultant Opportunities and statistics such as email sends, successful deliveries, opens, clicks, bounces.
- Integration with MailChimp email cloud marketing platform.
- Ongoing support contract with Strategy 365 for both Dynamics 365 and Office 365.

## Benefits

All Client information is now held in a single Dynamics 365 platform that is accessible by all the users within the organisation. This solution has considerably reduced the amount of effort previously required to manage client information and is now delivering sales customer insight and opportunity management that was lacking in the previous solution. Additionally, by leveraging the full Office 365 stack, PAG are now able to improve their collaboration, security and more easily manage their day-to-day requirements.

*"We've had some real success with marketing, so I expect to be investing in more Dynamics 365 development shortly. Such as simplifying data import updates and client marketing segmentation."*

Tom, Director, Premier Advisory Group