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CASE STUDY

Belcorp Industries Inc. is a private investment firm with three investment pillars: real estate, operating businesses and capital markets. Belcorp invests in the western United States and Canada and is headquartered in Vancouver, BC.

Challenges

Install Dynamics 365 cost-effectively, quickly and stress-free.
Rapidly and affordably adapt Dynamics 365 to Belcorp's needs.

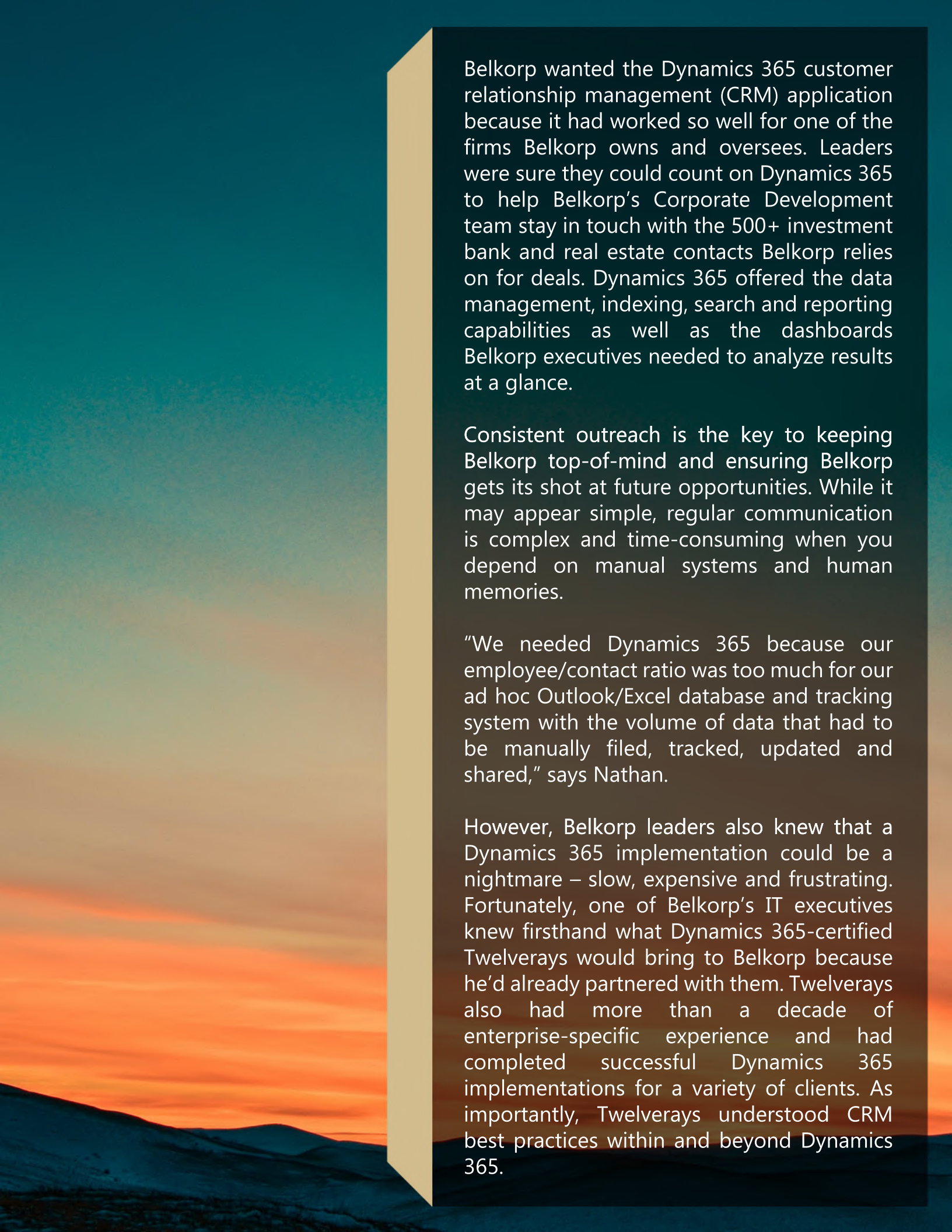
Solution

Twelverays' Dynamics 365 Implementation & Customization.

Results

80% more cost-effective, 80% faster, stress-free implementation.
Customize 20% of Dynamics 365 processes.






Belkorp wanted the Dynamics 365 customer relationship management (CRM) application because it had worked so well for one of the firms Belkorp owns and oversees. Leaders were sure they could count on Dynamics 365 to help Belkorp's Corporate Development team stay in touch with the 500+ investment bank and real estate contacts Belkorp relies on for deals. Dynamics 365 offered the data management, indexing, search and reporting capabilities as well as the dashboards Belkorp executives needed to analyze results at a glance.

Consistent outreach is the key to keeping Belkorp top-of-mind and ensuring Belkorp gets its shot at future opportunities. While it may appear simple, regular communication is complex and time-consuming when you depend on manual systems and human memories.

"We needed Dynamics 365 because our employee/contact ratio was too much for our ad hoc Outlook/Excel database and tracking system with the volume of data that had to be manually filed, tracked, updated and shared," says Nathan.

However, Belkorp leaders also knew that a Dynamics 365 implementation could be a nightmare – slow, expensive and frustrating. Fortunately, one of Belkorp's IT executives knew firsthand what Dynamics 365-certified Twelverays would bring to Belkorp because he'd already partnered with them. Twelverays also had more than a decade of enterprise-specific experience and had completed successful Dynamics 365 implementations for a variety of clients. As importantly, Twelverays understood CRM best practices within and beyond Dynamics 365.



Discovery & Install Processes Tailored to Belkorp

"Twelverays was 80% faster and cost 80% less than competitors, but what really stood out and made the implementation stress-free was their ability to listen and hear us," says Nathan. "They were willing to adapt their discovery and implementation processes to our company's scope and needs which made it painless."

Agile and flexible, Twelverays slashed the discovery time to less than four hours from the more typical 10- to 20-hour discovery. As a result, Twelverays quickly found out what really mattered to Belkorp – immediate access to Dynamics 365 and its off-the-shelf capabilities. Within six weeks, Belkorp employees were using and experiencing Dynamics 365's basic processes themselves. They also benefited from the CRM and best practice insights Twelverays shared as Belkorp's team got to know Dynamics 365.

"We needed to get Dynamics 365 installed and start using it – sometimes that's the only way to figure out what works and what doesn't, particularly when your team isn't that familiar with CRM best practices and processes," says Nathan. "Twelverays understood that at a certain point, we needed to use it rather than keep talking about it to know what to modify and finetune for our use."

Price Reflects Scope & Requirements

Of course, the shorter discovery helped reduce costs, but Twelverays' clear communication and ability to adapt also affected pricing. Twelverays asked what the application needed to do for Belkorp and as employees used the application, they identified the customization required. Twelverays heard them, then did the work and billed accordingly.

Twelverays focused on the must haves and capabilities Belkorp told them they'd definitely use rather than billing for capabilities employees might never use. Belkorp got and paid for what employees needed – no more, no less.

"That's why Twelverays' quote was 80% less than some of their competitors' quotes, which were ridiculous in view of the fact Belkorp's implementation and customization were smaller in scope and far less complex," says Nathan.

Belkorp also appreciated the fixed rate pricing. Whether it's a partner or a senior developer, a weekday or a weekend, Twelverays' fees are the same. The invoices reflect the original quotes – no surprises! Twelverays also made those changes within a day or two – a rapid turnaround compared to competitors' five plus working days.

"We didn't change a lot – maybe 20% of the standard features were customized, but we knew what it would cost and it was enough to make the application even better for us," says Nathan.



Rapid Results with a Single Point of Contact

At Twelverays, Belkorp had a single point of contact rather than five or six, and it had a positive impact. It was more direct and therefore faster to ask for help and get a response – usually the same or the next day. Changes were made quickly and done correctly.

Colleagues' painful Dynamics 365 implementation with a different provider remains a stressor because they're still struggling with bugs their consultant couldn't or wouldn't address. As a result, they've hired Twelverays to troubleshoot and get Dynamics 365 working the way it should. Thanks to Twelverays' communication strategy, timely responses and technical skills, Dynamics 365 has always done what it's supposed to do for Belkorp.

"What we got with Twelverays should be a given with providers – but it's not," says Nathan. Dynamics 365 gives Belkorp peace-of-mind! Senior leaders and employees know their broker and investment bank network and all of the related information is safe and secure. Belkorp is more proactive and can use Dynamics 365 to measure its deal flow. At a glance, Belkorp knows who's reaching out to whom and when, and can share that information with a click.

Belkorp's team has instant access to contacts and related data as well as Belkorp's history with them even when the employee that knows them best isn't available. Dynamics 365 provides critical continuity and transparency which are a given when the application is properly implemented and strategically customized.

"Easy – that's the one word I'd use to describe Twelverays' Dynamics 365 implementation," says Nathan. "Our install was so simple – when you hire the right consultant – it's not stressful, costly or time-consuming."



Tr.

twelverays.agency
hello@twelverays.agency
1-888-860-1118

