

Dyn365 Assist Gives BDR a Roadmap to Success

Business Development Resources (BDR), headquartered in Seattle, WA, is the premier provider of business training and coaching services to HVAC contractors. With its expert-lead seminars, innovative SaaS solutions, and proprietary enterprise software suite, BDR helps their clients achieve peak profitability and efficiency.

Protecting the Brand by Preparing to Scale

BDR worked with Dyn365Pros to implement Microsoft Dynamics 365 in 2015. Soon after the implementation, BDR experienced explosive growth and needed to reconfigure its CRM to continue delivering quality services and products to its customers. Kim Archer, Vice President of Coaching for BDR, explains: "One of our brand values is empowered, passionate and heartfelt caring and support for our customers. We had to protect our brand. If we didn't make this scale, we wouldn't have been able to deliver to our customers at the level they were accustomed to." At that point, BDR needed to decide whether to bring Dyn365Pros back in on a time and materials basis or explore the idea of signing up for Dyn365 Assist.

"One of our brand values is empowered, passionate and heartfelt caring and support for our customers. We had to protect our brand. If we didn't make this scale, we wouldn't have been able to deliver to our customers at the level they were accustomed to."

KIM ARCHER

Vice President of Coaching
BDR

A Deeper Understanding with Dyn365 Assist

BDR knew it needed to reconfigure its CRM to meet present needs, but what about scaling for future growth? BDR also anticipated challenges with user adoption, maintaining a healthy system and the need for small workflow tweaks as business grew and evolved. It made sense to sign up for Dyn365 Assist, from a financial and from a communications standpoint, an added value that BDR discovered almost immediately.

After signing up for Dyn365 Assist, BDR's dedicated consultant provided Archer with admin, coaching and assistance, helping ensure BDR had a good understanding of system possibilities and establishing clear and open communication. As Archer attests, "It was powerful to see how everything could work together and to think about how to adjust our systems. It set the stage for success in that we could really understand each other." With this clear and open communication, the Dyn365 Assist consultant and Archer were able to map out a customized, precise roadmap to success for BDR.



Dyn365Pros.com
info@Dyn365Pros.com
760-585-4248

Reorganizing, Refining and Redefining Microsoft Dynamics 365

"Our consultant is amazing. She's firm but flexible and always listens. She'd pull something up and we'd decide that it worked for this, but maybe not for that. It was a very collaborative process." Kim Archer, Vice President of Coaching and Trainer for BDR. The consultant and Archer worked together closely, sharing the workload to maximize the CRM's performance. Together, they achieved this by:

- **Creating** three separate Business Process Flows designed to support three separate lines of business: Business Training, Profit Coaching and their proprietary HVAC solution called Opportunity Interactive.
- **Customizing** Dynamics 365 forms and configuring workflows for processes in instances where the standard forms and views did not align to how BDR wanted to view and work with the data.
- **Converting** Event forms to allow BDR to track, manage and report on operational and expense-related aspects of conducting remote training classes.

"I cannot say enough good things about Dyn365 Assist. Our consultant is always responsive and available anytime I have a question. As an administrator, I can better communicate our needs and free up our consultant's resources to work on the more complicated changes going forward."

KIM ARCHER

Vice President of Coaching
BDR

Destination Success with Microsoft Dynamics 365

The work BDR and Dyn365Pros did together has paid off—big time. BDR is saving time by not having to manually create reports, detailed travel packets and training calendars. It is able to better track leads and conversions, as well as sales numbers in each of the three newly reorganized opportunity groups. With Archer as the admin, she can easily create new forms, train new users and ensure the staff stays active in the system. Both Archer and the Dyn365 Assist consultant continue to collaborate to expand or refine current processes that keep BDR agile and ready to scale.

With Dyn365 Assist, open communication and collaboration leads to critical reorganizing, refining and redefining business process. This allows growing businesses to reap the greatest value from Microsoft Dynamics 365. By taking advantage of this service, BDR keeps Microsoft Dynamics 365 current and healthy. As Archer says, "I cannot say enough good things about Dyn365 Assist. Our consultant is always responsive and available anytime I have a question. We work very well together. As an administrator, I can better communicate our needs and free up our consultant's resources to work on the more complicated changes going forward."



Dyn365Pros.com
info@Dyn365Pros.com
760-585-4248