

# Modernizing Facility Services with Dynamics 365

Custom solutions on Microsoft Dynamics 365 Sales for a leading UK-based facility services provider, streamlining critical processes to significantly reduce operational costs and enhance customer satisfaction.

## Overview

We delivered a tailored suite of solutions on Microsoft Dynamics 365, transforming a UK-based facility services provider's operations and providing measurable business impact.

- **Accelerated Operations:** Streamlined service ticket resolution, which is now 60% faster, and reduced contract finalization time from a month to just 7-10 days.
- **Significant Cost Savings:** The intelligent job scheduling solution saved an estimated £2-2.5 million annually by improving efficiency and reducing missed site visits.
- **Enhanced Customer Satisfaction:** The unified platform, with its improved transparency and faster response times, led to increased customer satisfaction and loyalty.



## Client

The client provides property and outdoor maintenance services across the UK, combining innovative technology with tailored solutions. They specialize in winter gritting, grounds maintenance, and reactive works.

## Challenges

- **High Volume of Manual Work:** Managing hundreds of daily service requests manually led to backlogs, lost tickets, and missed deadlines.
- **Fragmented Systems:** Disjointed tools for contract management created departmental silos, causing communication gaps and compliance issues.
- **Inefficient Scheduling:** Manual job scheduling was error-prone, resulting in missed appointments and wasted technician hours, with up to 40% of site visits being missed.

- **Lack of Visibility:** Managers lacked real-time visibility into technician capacity and job status, making it difficult to allocate resources effectively.

## QBurst Solution

We developed three dedicated and custom-tailored solutions on Microsoft Dynamics 365 Sales to address the client's core pain points. By leveraging the flexibility of Dynamics 365, we provided a cost-effective solution that avoided the need for the expensive, full-scale customer service module. Our approach delivered a transparent, integrated, and scalable platform that significantly improved operational efficiency.

### The Three Solutions

- **Smart Ticketing System:** A custom, integrated ticketing system within Dynamics 365 that manages service requests across multiple departments with their own categories, priorities, and SLAs.
- **Centralized Contract Management:** A solution that uses Dynamics 365 as a single source of truth for contract creation, renewal, and storage, eliminating departmental silos and enabling automated, professional contract generation.
- **Intelligent Job Scheduling & Routing:** A smart, Excel-based scheduling tool powered by Power Automate and Dynamics 365 that automates job assignment and optimizes travel routes.

### Technical Highlights

- **Automated Contract Generation:** The system automatically generates professional, 25-30 page contracts, and uses DocuSign integration for secure digital signatures and automated storage.
- **Built-in Validations:** The scheduling tool included built-in validations that alerted managers to missing site details or team assignments, preventing costly mistakes.
- **Optimized Routing:** The system intelligently arranged site visits in order of proximity, reducing travel time and fuel costs.

- **Scalable Architecture:** Built on the flexible Microsoft Dynamics 365 platform, our solution is fully scalable to support the client's future growth.

## Impact: Streamlining Workflows with Accelerated Service Delivery

- **Accelerated Service Delivery (60% Faster):** Service tickets that once took days to resolve are now closed 60% faster. This was accomplished with a custom ticketing system within Dynamics 365 that fully integrated client communications and automated SLA alerts, eliminating data silos and significantly improving client satisfaction.
- **Streamlined Contract Workflow:** The contract finalization cycle was dramatically reduced from one month to just 7–10 days. This was achieved by building a centralized contract management system in Dynamics 365, which eliminated manual drafting and enabled seamless collaboration, speeding up revenue realization and improving compliance.
- **Million-Dollar Savings and Optimized Operations:** The new intelligent, automated job scheduling system successfully reduced missed site visits to zero and operates reliably, saving the client an estimated £2 – 2.5 million annually. By providing a flexible, in-house solution, the client eliminated third-party costs, manual errors, and optimized technician routes, leading to improved efficiency and productivity.
- **Enhanced Customer Experience:** By providing faster, reliable services and timely updates at every stage, the client significantly enhanced customer satisfaction and strengthened their market position.