

FRP

FRP Advisory:

Saving *34%* over 3 years by
switching to **Dynamics 365**

ABOUT THE CUSTOMER

Clarity and confidence in times of change

FRP Advisory is a leading national business advisory firm known for its honest, clear, and considered approach, which delivers tangible results for clients. Specialising in restructuring, forensics, corporate finance, debt and financial advisory, FRP provides strategic solutions across a wide range of situations. Their five pillar services complement each other, leveraging experts from each area to ensure the best team is in place for every circumstance. FRP works with businesses of all sizes, from multinational organisations to small enterprises, developing effective strategies tailored to each client's needs.



THE CHALLENGE

Reimagining CRM: The need for a simplified approach

Through several years of complicated configurations, FRP's existing Customer Relationship Management (CRM) platform, Salesforce, had come to no longer be meeting the needs across the group's five service lines. This was leading to low engagement and a lack of output that hindered information sharing and efficiency. Furthermore, the architecture was not set up for performance reporting, meaning FRP had limited insights.

Thus, FRP found they had built up significant technical debt and needed a fresh CRM solution that more closely aligned with and simplified their ways of working.

With a diverse user base by the nature of FRP's business, intuitiveness and usability was key. Being an acquisitive organisation, FRP has industry-specific complexities around sales and operations, and sought a technology partner that could grasp their ways of working and offer a unified solution.

Through demonstrating a deep understanding of FRP's business and vision, as well as unmatched expertise in Microsoft Dynamics 365, **Telefónica Tech was chosen by FRP to deliver their modern CRM solution.**



Through becoming a collaborative team with FRP, Telefónica Tech delivered a painless switch from Salesforce to Dynamics 365. We now have a modern, easy-to-use CRM system that will help FRP continue to grow into the future. The Telefónica Tech team were instrumental in ensuring success—their understanding of all stakeholder perspectives and solid blend of soft and technical skills helped us feel like one team.

Yvonne Finlayson

Business Transition and Projects Director, FRP

THE SOLUTION

Focusing on user engagement and long-term value

FRP decided on Telefónica Tech and Dynamics 365 after a methodological and impartial review of marketplace leaders. A funded in-person envisioning session enabled FRP and Telefónica Tech to identify challenges and aims from the outset, laying the foundations for a successful implementation and migration project. Over an aggressive 3-month timescale, **Telefónica Tech delivered the in-scope solution on time and on budget.**

First, a flexible licensing structure was key. With a wide range of users, not all staff require access to all features. Importantly, FRP was looking for long-term value, which Dynamics 365 could offer.

It was recognised the biggest challenge was going to be user adoption among an audience that had become apathetic to the value of CRM. However, through Dynamics 365's intuitiveness and functionality FRP colleagues have been able to engage with the platform quickly, building back trust and delivering clear ROI.

From administrative roles to business development to senior executives, FRP's diverse users are getting value from the new CRM solution. For example, alongside Dynamics 365 Sales, Telefónica Tech implemented Dynamics 365 Customer Insights - Journeys to replace Salesforce Account Management. This enables the marketing team to seamlessly run events, plan campaigns, and monitor engagement levels. Partners are tracking activities across the business and building up a view of performance insights, supporting them to develop and strengthen industry relationships.

By the nature of the advisory industry, anyone across FRP can bring in business, rather than relying on a traditional sales team. Now, users are able to log and track this information with ease and quickly understand what's flowing through the organisation at any given time. Furthermore, FRP can also manage outgoing referrals to accountants and lawyers, maintaining reciprocal relationships.



Working with Telefónica Tech was a very positive experience. From the outset, Pre-Sales actively listened and took the time to understand our industry. For implementation we had an excellent, highly skilled team and their calm demeanour, strong technical expertise, and engaging communication style inspired confidence. They effectively managed the workload and relationships, addressing issues promptly and offering thoughtful solutions that added real value to the project.

The team's ability to actively listen, provide wise counsel, and guide us through tight deadlines made a potentially stressful process seamless and enjoyable. In addition, our inhouse team also significantly improved their knowledge. Telefónica Tech brought the right balance of professionalism and humour, and their problem-solving was instrumental in building trust. The project's success was a testament to their dedication and skill, and I wouldn't hesitate to recommend Telefónica Tech for future collaborations.

Yvonne Finlayson

Business Transition and Projects Director, FRP



THE SOLUTION

System integration and effective change management

A major strength of Dynamics 365 is its integration with the wider Microsoft 365 ecosystem. This enables user uptake and ongoing engagement due to familiarity—for example, some of FRP's users prefer to interact with Dynamics 365 directly within Outlook, where they are comfortable working.

In addition, Power BI dashboards are enabling immediate, embedded analytics and equipping leadership with meaningful insights into company performance. The embedded Dynamics 365 CRM Copilot is enabling FRP with AI-insights, with plans to configure Copilot Studio in the pipeline. What's more, by its nature, CRM is a rich repository of business information—and Dynamics 365 is able to easily share data with Microsoft Fabric, which FRP is investing in as an end-to-end intelligence platform.

It was important for FRP to get stakeholder buy-in across the enterprise by demonstrating the benefits of Dynamics 365 and making it as easy as possible to use. Therefore, a solid change management process has assisted in naturally boosting adoption: for example, FRP has established a champions network, regular new feature sessions, strong update communications, and a knowledge hub including on-demand training. Combined with the intuitive user experience of Dynamics 365, FRP leadership were able to quickly pick up the system and offer top-down endorsement and advocacy.



Our Telefónica Tech Project Manager did an excellent job of breaking down this large project into daily objectives, which kept us moving forward. We became a close team, working in collaboration with a real sense of camaraderie. Importantly, Telefónica Tech not only successfully delivered Dynamics 365 CRM but helped us learn—we can now be self-sufficient with a lot of tasks, while knowing the Telefónica Tech team are always on hand to assist when needed

Sarah Winder

Client Data & CRM Senior Manager, FRP



THE RESULTS

A flexible CRM solution that maximises return on investment



Approx. **34%**
saving over 3
years (inclusive of
transition costs)



Increased active
license holders
from **42% to 62%**



Increased demand
for licenses, going
from **335 to 500**
in the space of
6 months



Data quality
improvements are
delivering **robust**
performance



Removed
bottlenecks around
email marketing



Strengthened
FRP's offering as a
parent organisation

Having had their Dynamics 365 CRM from Telefónica Tech live for 6-months, FRP is receiving positive user feedback and has successfully changed CRM perceptions across the board.

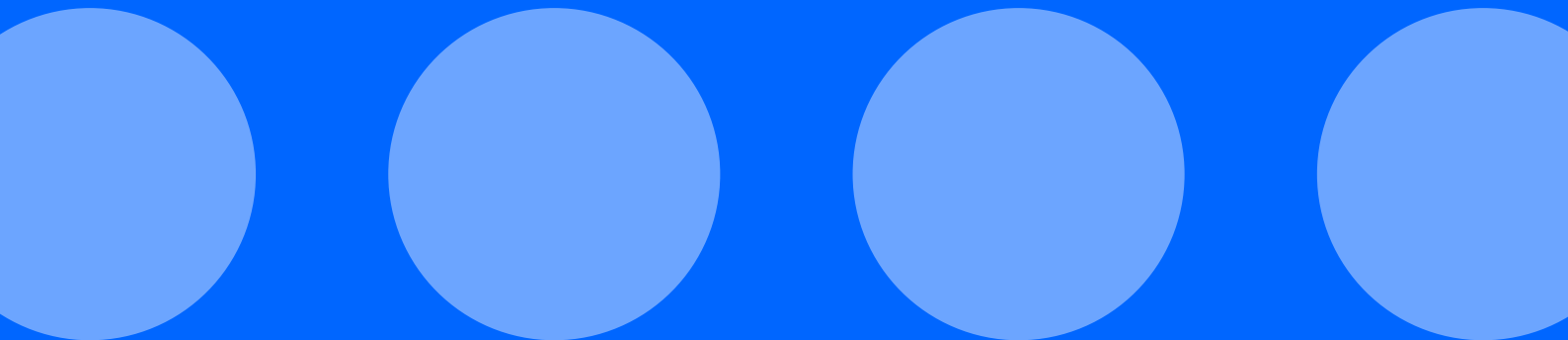


Using the system has been smooth and intuitive. The information was introduced gradually during the onboarding process, which prevented overwhelm and supported the development of strong habits and a clear understanding of how the system functions within our operational workflows. Whenever I've had technical questions, they've been addressed promptly, and the reporting capabilities now give us valuable, clear insights into our business.

Jenna Herlingshaw

Business Development Manager, FRP





Leading the Way in *Digital Transformation* for our Customers

Telefónica Tech unlocks the power of integrated technology, bringing together a unique combination of the best people, with the best tech and the best platforms, supported by a dynamic partner ecosystem to make a real difference to every business, every day.