

Built on Dynamics 365, Work 365 helps you deliver exceptional customer service, increase profit margins, and streamline accounting and sales.



INNOVIA
CONSULTING

Customer: Innova Consulting

Onalaska, Wisconsin

Industry:

NAV/BC Consulting Firm & Microsoft Gold Partner

Needs Expressed:

- *Simple onboarding process*
- Provision products and bundles easily and quickly
- A *billing/provisioning* solution that could work with Microsoft's *constantly changing products, platforms and systems*
- Capture *customers insights*: subscription history, know what customers have bought and why?
- Simplify Azure Billing

Benefits Realized:

- Since June. 2018, Innova has added 6,000 licenses without hiring a single new sales or support member
- Onboarding a new customer now takes less than 3 minutes – saving more than 5,700 hours YTD in 2018
- A platform and solution that can help them grow and scale

Learn More

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Case Study: Work 365: How a leading Microsoft CSP achieves operational efficiency and scales up for 300% Growth

Innova Consulting needed a solution to scale their Cloud business as a Direct Microsoft CSP. The objective was to implement a system that make its sales, billing and support processes more efficient, while providing quick and effective customer service.

Customer Story

Innova is a leading Microsoft Business Central Partner and leading CSP in North America. They have been in the Cloud Services Program since 2014.

Innova's customers are transitioning to the cloud. The business is growing and with the growth there are scalability challenges.

Innova was using manual processes that slowed down sales. **Managing mid-term license changes, Azure Usage based Billing and Subscription Management** was very cumbersome.

The issues were accentuated by the constant changes in the CSP program. For example, The Direct CSP program requires partners to have a system that automates customer onboarding, billing, bundling and provisioning capabilities.

Innova wanted a tool that was easy to setup and extend. They wanted to work with a partner that understood the business and could implement a solution quickly.

Innova's team researched a number of SaaS based CSP Automations Providers but found that these systems lacked an understanding of the business requirements of the Microsoft ecosystem, its products, and the complexities of the Dynamics partners.

Also, these were Standalone SaaS based solutions which meant the critical customer data would be in silos. They also lacked the extendibility and adaptability that Innova was looking for. Solutions offered pricing model based on revenue share which was not ideal for Innova.

"It gets partners to use the same products their customers are buying." Donavan Lane, CEO, Innova

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Chosen Solution

Innovia ultimately chose Work 365 to help its CSP business scale. Work 365 is a Customer Experience Platform built on Dynamics 365 that delivers:

- Billing and invoicing automation
- Integration with Microsoft Partner Center
- Customer Self-Service Portal

Implementation

Innovia started off with the Work 365 Onboarding. This process took 4 weeks and involved the migration of customer data from their existing PSA system.

The Work 365 and Innovia team set up billing contracts, product catalog, invoicing schedules and integration with the Microsoft Partner Center.

Innovia quickly realized that Work 365 makes the process for Partners and CSPs "dummy proof". Its favorite feature is the **bidirectional synchronization with Partner Center**, which ensures information in both systems is accurate and current.

Solution in Action

Innovia's can now provision a brand new tenant, transition CSP customers, manage subscriptions and provision brand new Cloud services and reconcile their Microsoft Invoices using Work 365.

Since the solution is **built on the Microsoft Cloud** (Dynamics 365, Azure, Office 365) Innovia's teams use different aspects of Work 365 depending on their role:

- **Sales:** uses Work 365 to close customer deals, customer accounts, billing contracts, and subscriptions.
- **Customer Service and Support:** Manages provisioning, keeps track of license quantities and license change histories
- **Finance and Accounts:** Generates and manages invoices, billing, and payment management

Innovia's customers use the Work 365 Self-Service Portal. Through the portal, customers can manage their license quantities, view their invoice history, and keep track of their usage data for cloud solutions like Azure.

Dynamics 365 + Office 365 + Work 365



Unified Process and Data = Game Changing Opportunities

Case Study: Achieving 300% CSP Growth by Improving Operational Efficiency

Results

Work 365 is currently saving Innovia the equivalent of 3.5 FTEs each month, fueling a projected 300% growth in its CSP business. The company has saved time, increased productivity, and grown profitability thanks to the following benefits:

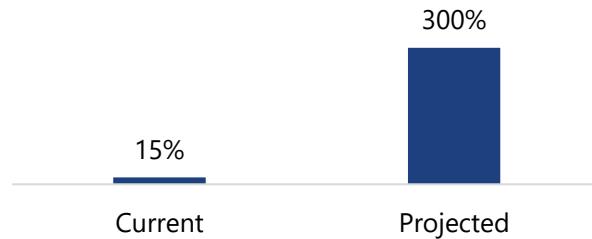
- The ability to reconcile Microsoft invoices without having to keep track of customer license histories and quantity changes
- Automatically provision licenses for customers
- The ability for customers to manage their subscriptions through the self-service portal and see changes immediately
- Bi-directional data exchange with Partner Center which saves time and reduces costly errors

Leveraging the full Work 365 platform automates the entire process of managing subscriptions/ licenses and sending invoices. This frees up significant time for sales, customer service, and accounts teams, which allows Innovia and other CSP businesses to scale and increase profitability.

*"We scaled to over 6,000 licenses without adding another support person. Onboarding each new customer took up to an hour but now we can do it in 3 minutes or less, saving us over 100s of hours since June 2018. Because of these efficiencies, our projected growth for our **CSP business** is 300%."*

– Donavan Lane, Chairman, Innovia

Innovia's projected CSP growth with Work 365



Time to Onboard a New Customer, in Minutes

