

*Case study* —————>

# SCALABLE TRANSFORMATION WITHOUT DISRUPTION


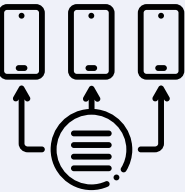
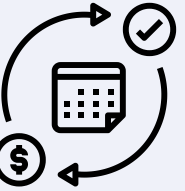


How Infinity Group unified their revenue streams,  
saved £1 Million, and futureproofed their business  
– **one function at a time.**

## *About Infinity Group*

A leading UK award  
winning Microsoft  
Partner founded in 2001.

Employees: 180+

Mission: Helping  
organizations digitally  
transform, increase  
productivity, and reduce  
costs through innovative  
Microsoft 365, Dynamics  
365, Azure, and security  
solutions

	BEFORE WORK 365	AFTER WORK 365
	Sales orders across disconnected tools	Entire lifecycle, from quote to provisioning managed in Dynamics and Work 365
	Manual provisioning with high error rates	Automated provisioning and billing tied to sales orders
	No single source of truth for subscriptions	Unified product catalog, pricing, and contract enforcement
	Service desk unaware of active support status	Support tied to entitlements, no more free support leakage
	Marketing had no visibility into real usage data	Campaigns driven by real-time data (e.g., seat counts, product mix)
	WORK 365 SCALABLE TRANSFORMATION WITHOUT DISRUPTION	

# BUILD *vs Buy*

Infinity could have built a billing system, but knew better. The complexity and risk weren't worth it. Work 365 didn't just deliver software; it brought strategy, support, and long-term partnership.

“Infinity Group understood the value of expertise. They knew that building a unified CSP management solution from scratch would take too many internal resources. **We were able to offer them options, flexibility, and a roadmap to scale.**

- Ebrahim Nalwala, CRO at Work 365

“We did the build vs. buy analysis and knew the worst parts are data and integration.

**With Work 365, we avoided that risk entirely.**

- Tristan Shortland, CIO, Infinity Group

## *What it means*

We had an Excel monster that needed four full-time people. ConnectWise forced us to create new SKUs for every discount. Work 365 ended that insanity.

- Tristan Shortland, CIO, Infinity Group

## *Why it matters*

Choosing a partner, not just a platform, sets companies up for sustainable transformation.



# STRATEGIC TECH STACK

## *Transformation*

**Infinity Group didn't want a messy patchwork of systems. They wanted alignment.**

They built their infrastructure from the ground up using Dynamics CE, Project Operations, and Dynamics BC for accounting, with Work 365 at the heart for CSP billing and customer management. All departments, from finance to support, now operate from a single source of truth.

Legacy systems like CSP Control Centre and ConnectWise were kept running during the transition to ensure zero disruption.



We knew we wanted billing and recurring revenue data inside Microsoft Dynamics, where our customer information already lived.

**Work 365 was the only solution that made sense.**

- Tristan Shortland,  
Chief Innovation Officer,  
Infinity Group

### *Why it matters*

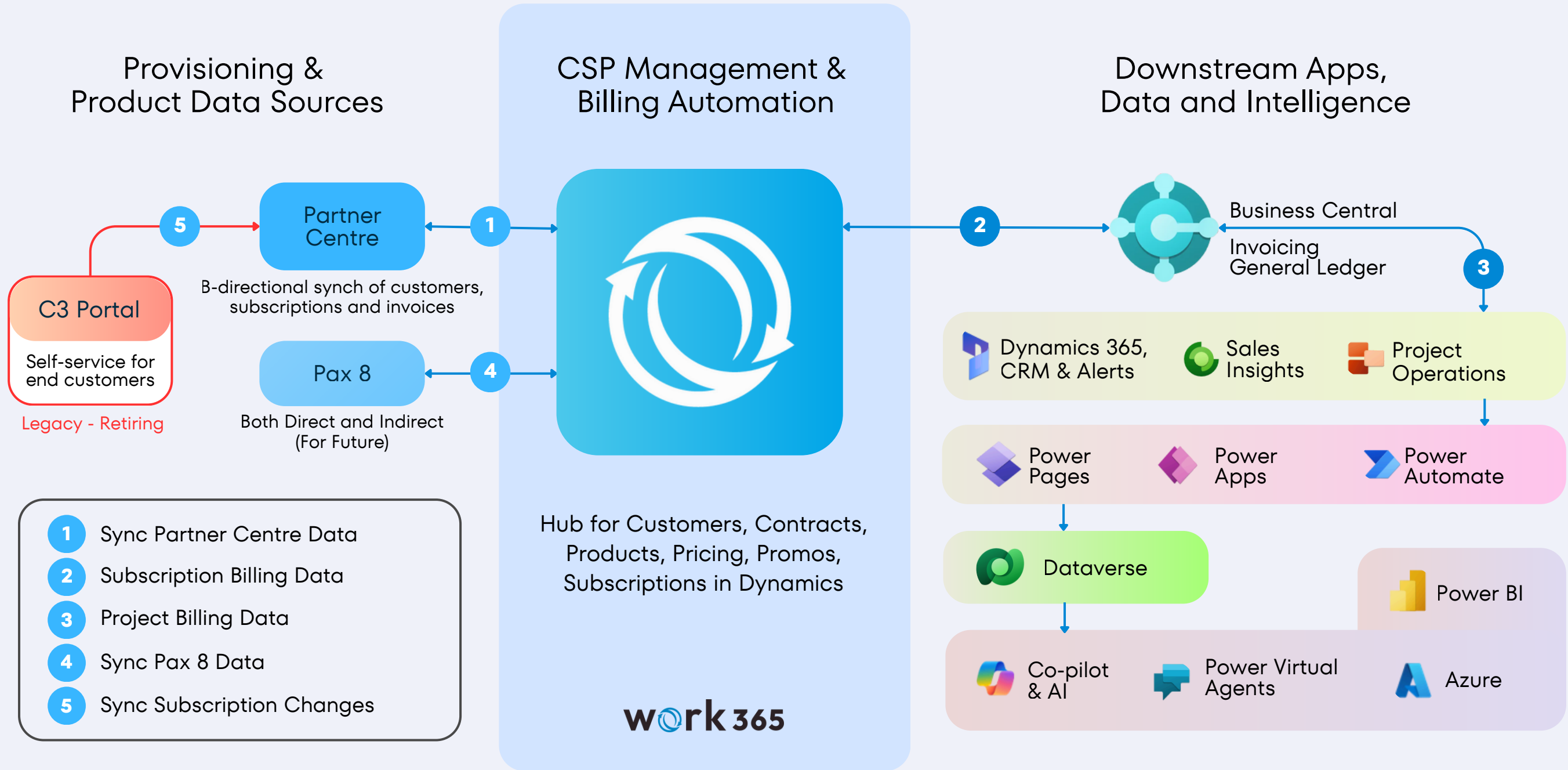
With CSP billing and customer data unified, transformation wasn't just technical, it was operational.

Work 365 provided visibility, consistency, and confidence.



# ONE PANE OF GLASS

*for all revenue data*



*Frontier Partner Ready*

Unlock Copilot and AI-powered insights with unified subscription, project, and sales data - all built natively on Dataverse

# GROWTH WITH *Control*

Infinity scaled without expanding headcount by automating previously manual billing and provisioning processes.

What used to take a dedicated billing manager is now handled by a single part time person focused only on exceptions.

**The rest is automated through Work 365.**

“

*Our billing manager retired, and we didn't have to replace her.*

*We know **we can now double revenue through Work 365** without increasing headcount.*

- Tristan Shortland,  
Chief Innovation Officer,  
Infinity Group

## *Why it matters*

Growth often means adding complexities, but not here.

With CSP automation from Work 365, Infinity Group was able to grow profitably and sustainably.

# STRATEGIC FOUNDATION

## *Aligned + Automated*



### SUPPORT TIED TO ENTITLEMENT

Tickets can now only be logged if the customer has an active support subscription, reducing free support drain.



### SMARTER SEGMENTATION

Marketing teams can now run campaigns based on actual seat counts—e.g., targeting customers with 200+ Business Premium licenses for E3 upgrades.



### BENCHMARK FOR AUTOMATION

Infinity uses Work 365 as the benchmark internally to drive automation in other departments like procurement and support.



### CUSTOMER INSIGHT

360° customer insight across services, licenses, and projects.



### SEAMLESS STRATEGY

Seamless hybrid distributor/direct channel strategy.



### EFFICIENT STANDARDISATION

Standardized lifecycle from sale to billing and renewals.



# RESULTS THAT *Stick*

*1 Million*

GBP/YEAR SAVED  
IN OPERATIONAL  
OVERHEADS

*75%*

REDUCTION IN  
MANUAL BILLING  
EFFORT

*100%*

BILLING COVERAGE  
ACROSS SERVICES  
AND CSP

*60%*

IMPROVEMENT IN  
BILLING TURNAROUND  
TIME





# WHAT'S *Next?*

With Work 365, Infinity Group didn't just solve billing—it defined a new standard for scale. The team aligned marketing, sales, provisioning, and support around a single source of truth, using Work 365 and the broader Microsoft stack.

Operational blind spots—like customers getting free support or misaligned licensing—were eliminated through automation. Internal teams now treat Work 365 as the benchmark for how systems should operate.

**And what started as a CSP billing solution became the foundation for growth—supporting automation, smarter campaigns, and margin control without headcount expansion.**



*I measure success by looking at the time my team saves. And Work 365 lets us grow without needing more people.*

***That's gold.***

- Tristan Shortland, Chief Innovation Officer,  
Infinity Group



# READY TO TRANSFORM YOUR CSP BUSINESS?

Let Work 365 be the catalyst that drives your operational excellence and growth. Reach out today to learn how we can help your CSP business reach new heights.



[work365apps.com](https://work365apps.com)



[sales@work365apps.com](mailto:sales@work365apps.com)

