

# Case Study

## Beat the Cold

Process Automation



### Company Introduction

Beat the Cold is an independent charity, working to reduce the incidence of cold-related illness and fuel poverty.

Based in Staffordshire, and formed in 1999, Beat the Cold support a large number of often vulnerable service users by delivering a service to reduce ill health, deaths and misery due to fuel poverty.

Beat the Cold is now a growing charity that informs, advises, and makes referrals for households – through telephone advice, events, talks and displays, and a winter leaflet.

Their core service user base is disadvantaged households that need to spend more than 10% of their income on fuel who can be supported to apply for measures and grants to improve energy efficiency, as well as be given advice on using fuel, paying for fuel and services from other agencies

Website: <https://www.beatcold.org.uk/>



**15<sup>+</sup>** staff  
Company size



**10** users  
Solution size

### Solution Components

- Microsoft Dynamics 365 Sales
  - Microsoft Dynamics 365 Customer Voice
- Microsoft Power Automate

## Project Summary

Strategy 365 spoke with Beat the Cold around their current use of Dynamics 365 Sales and how this could be enhanced to save time for their employees, reduce administration, and enable more time to be spent on providing their essential services to their clients. It was anticipated that the number of incoming referrals would be increasing significantly, so how these were initially handled was a key area for focus.

Once current business processes were analysed, it was clear that there was significant administration time spent on converting enquiries sent via web forms, and emails to a shared mailbox, into records within Dynamics 365 Sales. Following discussions with Beat the Cold, Strategy 365 proposed a solution to embed Dynamics 365 Customer Voice forms into their website to allow these enquiries to be sent directly to their Dataverse environment. Power Automate would also be used to create enquiries and send email alerts as required. Discussions were also held around Beat the Cold accepting enquiries from other sources and projects, and several forms, URLs and QR codes were created to allow submissions from local authority websites, emails, and promotional material which would all be processed in the same way.

Further areas of interest were around the onward referral of clients to other support services, a process that was manually completed by Beat the Cold team members sending emails and awaiting a response. It was agreed that this could be automated to allow these onward referrals to be triggered directly from Dynamics 365 Sales, at the click of a button, with templates being populated with the appropriate data; again, saving significant time on tasks that are performed frequently by the team. It was also decided that creating enquiries in Dynamics 365 Sales from voicemails would allow the team to provide a better service. A centralised data store of all enquiries, regardless of source, would allow all enquiries to be dealt with in a fair order more easily.

## Key Deliverables

- Forms for standard and project enquiries with eligibility criteria questions to ensure all clients submitting are eligible for the support requested
- Creation of enquiry records following form submissions
- Dashboards to visualise the team's workloads, view new enquiries, and be able to allocate these out to the team as appropriate
- Provide the ability to monitor the source of enquiries and report on key enquiry metrics
- Automate onward referrals to outside organisations, directly from Dynamics 365 Sales
- Creation of enquiries from voicemail messages

## Benefits

Beat the Cold now operate with their Dynamics 365 Sales environment as their single source of truth, with all enquiries and the progress of these enquiries contained within it. The management team can now more effectively manage the workload of the team and allocate enquiries more efficiently once they are automatically processed. The wider team can also manage their workload and enquiries easily in one place and track their progress, marking enquiries as complete when appropriate. These enhancements have enabled Beat the Cold to reduce administration time significantly and more effectively manage an increase in demand for their services of 1200% from the previous year. Team members can now focus more on providing their knowledge and expertise to deliver a crucial service and deliver value to their clients.

*"Strategy 365 have provided guidance and support to get the most out of our CRM system. By automating some of our back-office processes, it has allowed the team to get on with their core job of providing advice and support to vulnerable clients."*

Martin, Business Development Manager, Beat the Cold