

Case Study

PH Property Holdings Limited

Dynamics 365 and Power
Platform Implementation



Company Introduction

Over the last 25 years, PH Property have established an enviable reputation for creating the highest quality homes in the very best locations, for the most discerning clients - from family homes and country estates, to some of the world's most spectacular villas in Mallorca's glamorous Port Andratx.

With such high standards, the business was keen to implement a solution to help manage the full sales cycle of a new home, from initial enquiry and property viewings, right through to completion, moving in, and beyond. There was also a desire to manage the actual construction process from start to finish - from managing potential new locations suitable for new developments, through to post-sale after-care support for new homeowners.

Strategy 365 were initially engaged to implement Dynamics 365 Sales to manage and track new sales leads and opportunities, but the implementation has developed in phases to include plot and site management, Rightmove integration, bespoke mobile apps, complex reporting, and a self-service customer portal.

Website: <https://www.phph.co.uk>



50+ Staff
Company size



23 Users
Solution size

Solution Components

- Microsoft Dynamics 365 Sales
- Microsoft Dynamics 365 Customer Service
 - Microsoft Power Apps
- Microsoft Power Apps Portals
- Microsoft Power Automate
 - Microsoft Power BI
- Bespoke API integration

Project Summary

The initial phase of the project was to implement Microsoft Dynamics 365 Sales to ensure that new sales leads could be captured and their progress followed through to a potential property sale. From there, the next logical step was to also use Dynamics 365 to track the progress of property construction. Every aspect of a new plot's progress is now tracked:

- key milestone construction dates
- progress in each phase of the construction
- sales interest, including the recording of viewings and offers

Several integrations were also introduced:

- website integration, resulting in website contact form enquiries automatically creating sales leads in Dynamics 365 Sales
- Mailchimp integration, allowing contact data to be used for email marketing activities
- Rightmove integration; automatically creating enquiries as sales leads in Dynamics 365 Sales

For post-sales after-care, Dynamics 365 Customer Service case management, as well as a self-service customer portal, were also implemented. Working with the design team at PH Property, a branded portal was deployed to allow new homeowners to access documentation for their property and report any teething issues that needed to be addressed.

As the construction of a luxury home is very detailed and the process to build such a property can be lengthy, it was also important to be able to track the progress in an accurate and efficient manner. To achieve this, a number of Power Apps canvas apps were developed to allow on-site managers to easily enter plot progress details as they worked.

With the growing accumulation of data across all aspects of the business, it was also vital to have an accurate reporting function. With the development of a number of detailed Power BI reports and dashboards, management now have an overview of sales and construction and, where required, can drill in to the tiniest detail should a potential issue be identified.

Key Deliverables

- End-to-end sales process management
- After-care case management
- Site and property construction process management
- Model-driven Power Apps solution for office workers
- Bespoke mobile canvas Power Apps for on-site staff
- Self-Service Customer Portal for property buyers
- Integration with external property sales website
- Detailed reporting functionality using Power BI

Benefits

By consolidating all their business data and processes into Dynamics 365, PH Property now have a single source for all their day-to-day company information. This has brought many benefits:

- using Dynamics 365 process automation to remove the need for repetitive manual processes
- on-site staff can update Dynamics 365 records via their mobile devices
- website and Rightmove sales leads are automatically captured in Dynamics 365
- a self-service portal helps reduce the need for manned customer service
- detailed reporting highlights trends and helps to identify potential issues

"Dynamics 365 and the Power Platform have given us a scalable system that helps us to manage our properties from start to finish, and with Strategy 365, we have a partner that is always able to meet our exacting requirements. As we have expanded our CRM system to cover additional areas of the business, these have been smoothly implemented and with first-rate support."

Philip Hughes, Managing Director, PH Property Holdings Limited