

Case Study

PNE Controls

Power Apps Quick Start
Implementation



Company and Project Introduction

Operating for over 7 years, PNE Controls Limited is a modern electrical company, committed to the production of high quality, bespoke electrical design, manufacture, installation, software, and support services for industrial automated systems.

A dedicated team with over 25 years industry experience, PNE Controls work with all the leading key industry manufacturers to ensure tailored packages are delivered to customers, meeting their specific requirements. Whether that is conception to completion, or the design and manufacture of a control panel, to a complete integrated automated system.

Previously, PNE Controls were managing sales and projects in Excel spreadsheets until they started to look for a cloud-first solution to help improve processes, drive automation, and bring about the centralisation of data. The business needed a solution that would handle the full sales cycle, from initial enquiry, through to job completion with a customer.

After a conversation with Strategy 365, a demonstration of both a Dynamics 365 Sales and Power Apps approach to the project was delivered. It was recommended that a Power Apps Quick Start package would be the best solution for PNE Controls. This delivers fixed-cost predictability for the implementation and with low risk and lower software licence costs.

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



12⁺ Staff
Company size



5 Users
Solution size

Solution Components

- Microsoft Power Apps
- Microsoft Licensing
- Support Services

Project Summary

PNE Controls wanted a simple solution, but also needed to utilise Marketing Lists. Analysis from Strategy 365 showed that PNE Controls would not benefit from the full functionality of Dynamics 365 Sales. Therefore, a Power Apps solution which leveraged the Marketing Lists capabilities of Dynamics 365 Sales was implemented. As a result, this also lowered the total cost of the project.

The solution built within Microsoft Power Apps helps PNE Controls to capture leads, convert them into deals, and then track the progress of each job. Strategy 365 collaborated with PNE Controls to define a process that each user would follow to ensure process consistency for each lead. The process designed within Microsoft Power Apps was:

- Quote > Decision > Kick off > Engineering > Invoiced. A lead would be closed as lost or won in the system, which will lead to a job being created if the lead was won. Also, a user cannot proceed without the required information being completed at each stage.

As PNE Controls' projects can take substantial time to complete, functionality was developed so the progress of each job can also be tracked. Users can now see who is in charge of design, engineering, and whether deadlines are being met. The job will only be completed within the system once it has been signed off by the engineer in charge of the project.

Furthermore, PNE Controls now have access to simple reporting and dashboards within Microsoft Power Apps, to give management an overview of the business. For example, a dashboard can show open job invoices and performance of the business in the last 12 months. Conversations have also been held around a second phase of the system which would involve implementing functionality to help track where each piece of software has been installed.

As this project was built using a Microsoft Power Apps Quick Start package, the solution was built within five working days at a low, fixed cost. To find out more about our Quick Start packages, please click [here](#).

Key Deliverables

- Centralised system for all their data
- A process to manage leads, sales and progress of jobs being carried out for customers
- Simple-to-use system for users

Benefits

PNE Controls have a centralised solution for their day-to-day management of the business, bringing the following benefits:

- A single, simple system which consolidates data in one easy-to-access location
- A sales process for users to follow, ensuring consistent processes for each lead
- The ability to track the progress of each job, ensuring deadlines are met
- Reporting and dashboards available to enable management to gain insights and highlight trends

"Strategy 365 are a pleasure to work with. They work well at a highly technical level but also describing in a way for non-technical to understand. Great experience all round."

Chris Batty, Managing Director - Controls, PNE Controls