Isabel Group enables data-driven customer engagement with Microsoft Dynamics 365

Isabel Group is the largest FinTech company in Belgium and offers customers a complete range of financial software solutions (including Isabel6, CodaBox and Zoomit). Financial professionals from companies, schools and government institutions can use Isabel Group's software for a secure and reliable exchange of digital documents, payments and identities. Isabel Group consists of more than 300 experts and has been active for 25 years. Customers such as Barco, Port of Antwerp and Colruyt Group use the software for already many years to digitize their financial processes.

To help customers even better, Isabel Group invested in a data analytics team and a new CRM tool. Net IT took care of the implementation of Microsoft Dynamics 365 as a CRM application. Tim Van der Wee, Chief Information & Technology Officer at Isabel Group: "Net IT's expertise as a Gold Microsoft Partner enabled us to quickly get value from our Dynamics 365 applications."

Data-driven customer engagement

Within their vision of data-driven customer engagement, Isabel Group wants to be able to better anticipate the needs of its customers. Tim: "For this we need a 360° view of every customer. At the start of project, we first analyzed the applications that had to be developed to enable data-driven customer engagement. One of these applications was a CRM tool."

Microsoft Dynamics 365 was the right CRM solution for Isabel Group. It offers ready-to-use apps for sales, marketing, omnichannel customer service and also other additional technologies such as artificial intelligence.

One central common data model

A key challenge within this project was bringing together business and customer data from multiple systems and applications. Isabel Group consists of different business units, each of which had its own sales and customer service tools. Net IT ensured the integration of all this data from the various systems and applications into one central common data model. Data from customers, users and products were collected, deduplicated and merged.

> "With the CRM tool we want to streamline our processes of marketing, sales and customer support."
>
> Tim Van der Wee
> *Chief Information & Technology Officer at Isabel Group*

The Microsoft Common Data Model made this integration less complex and time-consuming. This data model offers a common 'data language' for sharing data between business processes and applications such as Microsoft Dynamics 365, Power BI and Azure.

Streamlined marketing, sales and customer support

Thanks to the central data model, sales, marketing and customer service can work (together) much more efficiently. "The advantages we expect from this CRM tool are a better visibility on the sales pipeline and more predictability to enable cross- and upselling: who are our current and future customers? What products do they have? What do they need at the moment?", explains Tim.

Ultimately, all this should lead to a consistent customer interaction and customer experience throughout the entire process of marketing, sales and customer support.

Change management, "what's in it for me"?

Tim: "Another important challenge of the project was change management. To let people discover "what's in it for me" when they use this new tool."

Indeed, the implementation of Microsoft Dynamics 365 applications is not just about introducing a tool, but also about letting different teams with their own identity work together and about making people work differently. Tim further explains: "The tool can work perfectly and be seamlessly integrated, but if you don't go the extra mile to make sure people can use the tool successfully, then it gets difficult."

> "*Microsoft Dynamics 365 offers the right balance between security and flexibility.*"
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> Tim Van der Wee
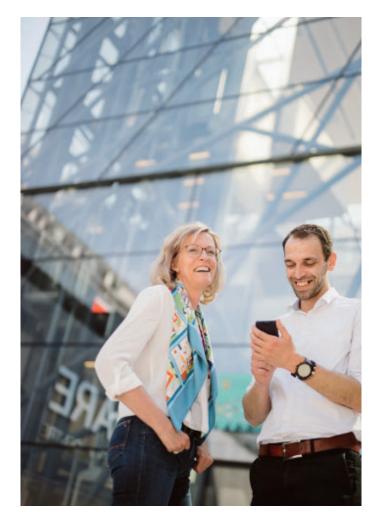> *Chief Information & Technology Officer at Isabel Group*

Right balance between security and flexibility

As a regulated FinTech, security is very high on Isabel Group's list of priorities, more specifically the confidentiality of data. That's what Microsoft's ecosystem offers them. Tim: "Microsoft offers components that allow us to find the right balance between security and flexibility. We also have chosen Microsoft because all Microsoft products connect well with each other."

Digitalisation a continuous process

Isabel Group wants to further accelerate the digitalisation of its own internal processes and thus also be an example for its customers. "The best way to understand the needs of our customers is to continuously raise the bar on digitalisation for ourselves," concludes Tim.