



CRM DYNAMICS

INCOMM CASE STUDY

HOW INCOMM PAYMENTS TRANSFORMED
THEIR MANUAL PROCESSES WITH
DYNAMICS 365

2019/2020
INNERCIRCLE
for Microsoft Business Applications



Gold
Microsoft Partner



InComm Case Study: Digital Transformation

About



InComm Payments Inc., founded in 1992 and headquartered out of Atlanta, Georgia, is an electronic point of sale solution provider. InComm offers gift cards, financial tools, wellness benefits, and even tolling and transit payment products. As a global brand, InComm provides innovative payment technologies for retailers, brands, and consumers across the world.

Digital Transformation

“We have been dedicating lots of energy to improving our processes since 2015”, says Ricardo Santos, Director of Process Improvement at InComm. “In the past, poorly defined processes, methods, and procedures used to be obstacles to our execution. So much improvement was needed in the process flows.”

Ricardo worked to define business processes, create documentation, and train employees on optimized practices without the presence of any actual automation tools or frameworks. Through this process improvement program, InComm Canada division was able to improve measurable operational efficiency by 50%.

“The next step in our process improvement journey was to leverage technology to support the processes we had created. At this point, we began adopting Office 365 and utilizing Sharepoint. One of the processes we targeted to streamline utilizing O365 was the management of franchisee contracts. The manual nature of this process had become a major pain point for Account Managers.”

inComm Case Study: Digital Transformation

CHALLENGE:

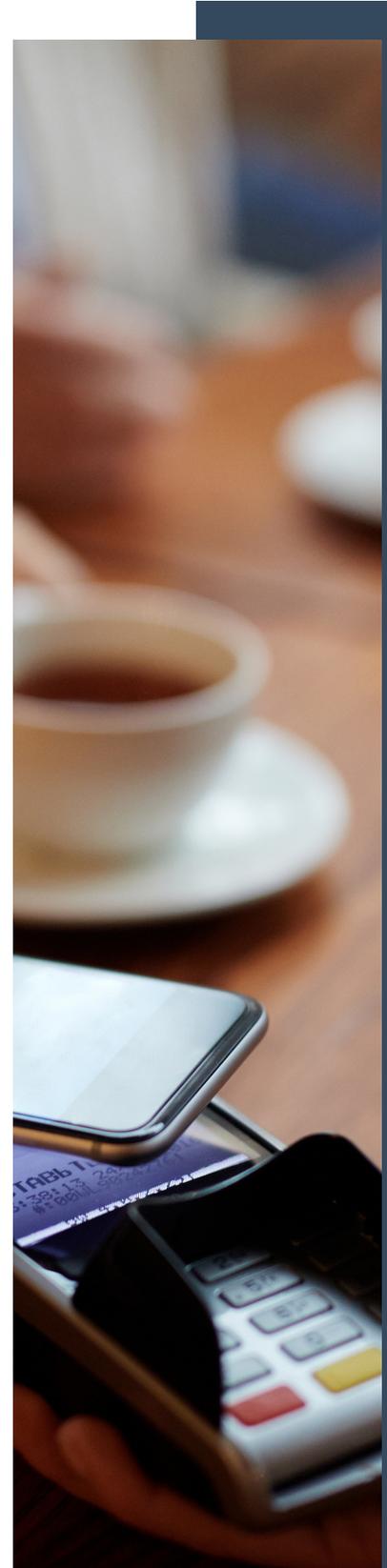
Prior to this Dynamics implementation, InComm was using manual processes to keep track of all contracts, which was very difficult to allow for changes, updates, or any visibility into current and upcoming contract renewals and expirations. With thousands of customers that require contract management, InComm really needed to address these challenges, which can be categorized into three main areas:

Inconsistency:

With contracts going to over 7000 stores and retailers, just in Canada, InComm's Account Management team struggled with the variations of templates and documents being used. From Word and PDF contracts with different fields to having address and contact information requiring revision due to inaccuracy; InComm was continually plagued with inconsistencies in their contracts, causing lots of rework for the Account Management team.

Costly:

Not only was there a huge time cost for ongoing issues with contract inconsistencies, but also sending documents back and forth for manual signatures to retailers due to lifecycle.



inComm Case Study: Digital Transformation

Decentralized information:

Siloed and decentralized information was not helpful for providing centralized visibility and tracking visibility to internal stakeholders. In most cases, the sporadic and displaced nature of data made it very difficult to get a handle on the many different stages of contract's lifecycle.

SOLUTION:

Since implementing Office 365, InComm had begun to utilize SharePoint for its manual processes instead of the cumbersome use of spreadsheets. With the built-in synergies of Office 365 and the Microsoft platform, Dynamics 365 was a natural next step for InComm.

After a referral from Microsoft, Ricardo reached out to CRM Dynamics directly to gain an understanding of our capabilities. "You were very responsive. After my initial call, within a day you were at my office (Pre-COVID) for a meeting to understand our business requirements. The pricing, scope, and expertise was all there, I was like – it looks like a good partnership is taking shape."

“Everything is working flawlessly. There is no doubt that Dynamics was the right choice, and we chose the right partner.”

- Director of Process Improvement, Ricardo Santos

InComm Case Study: Digital Transformation

BENEFITS & RESULTS

Contract Management:

With such a vast network of retailers, InComm must track thousands of contracts in an effective and streamlined manner. This need led the way for a unique integration developed by CRMD with Dynamics 365 and Adobe Sign, which enables InComm to manage every contract for all of the stores they work with efficiently. With Adobe Sign becoming Microsoft's preferred e-signature solution for Office 365, Adobe's functionality is deeply integrated across Microsoft's portfolio, including Microsoft Dynamics 365. With Adobe Sign built-in, information that a client enters into the contract can be directly moved into CRM. This integration ensures all data will be filled out in its entirety with consistent values, and allows for contract changes, updates, or any visibility into current and upcoming renewals and expirations with ease.

Opportunity Management:

Due to the nature of their business, InComm has only a limited number of accounts and opportunities that they need to record within a CRM. However, under these large accounts there are potentially thousands of franchisee's contracts and activities they need to track effectively. Implementing Dynamics to manage their sales cycle was not obvious at the beginning with InComm's pipeline being rather small. However, with each opportunity having very high valuations, and InComm's average sales cycle up to 3 years in length, Dynamics has been a huge help in managing these long term and deeply complex sales cycles.

Currency Automation

Another unique feature implemented has been updating all global currencies automatically every hour, providing the current value of exchange for financials. The global nature of InComm's operations and use of Dynamics, makes this a huge plus to reduce risk and increase accuracy when converting currencies directly to a base US Dollar. Currency updates were not done at all previously, but now through Power Automate, this is being handled automatically and in real-time.

inComm Case Study: Digital Transformation

TAKEAWAY & NEXT STEPS

“We are currently using Dynamics/Adobe sign solution to manage about 7000 stores here in Canada and we estimate to have saved at least 300 hours of work a year across 3 different teams by implementing this solution.”

With this new system automation, contract, and account management, as well as ongoing currency fluctuation capturing, InComm has increased operational efficiency, decreased non value-added admin hours and provided better service to all of its customers.

Moving forward, InComm is looking to increase their utilization of Power Platform, with more robust dashboards and reporting through Power BI.

For more information or to see a demo of our solution, please visit crmdynamics.com or contact us at experts@crmdynamics.com