

ABOUT THE ORGANIZATION

Bishop-McCann designs and produces meetings, incentives, and live events worldwide. They combine Midwest culture and values with agency expertise to create a globally relevant one-of-a-kind event experience. With over 20 years of experience in the industry, they currently organize over 300 events a year with over 78,000 hotel reservations annually, and are on the CMI 25, an annual list of industry leaders based on spend.

SITUATION

With CEO Rob Adams spearheading the efforts, Bishop-McCann (BMC) had embarked on a multi-year plan for digital transformation. As a part of that plan, Adams realized that BMC needed a single platform that could streamline and automate their complex business and give them the ability to scale.

One of the pain points BMC was experiencing was a lack of a central hub for collaboration. Project requirements would be in spreadsheets on employees' computers, often in multiple places. It also wasn't immediately clear what the customer had already shared with BMC regarding project needs, leading to a lot of duplication of effort. "We were doing our business through spreadsheets," says Adams. "Excel was our ERP."

Increasing operational efficiency was another big driver for digital transformation within the company. "Efficiency was important on the IT side," says Adams. "We needed to do more with less."

BMC also knew that they needed a better system for tracking the effectiveness of their marketing campaigns to ensure they were spending money on the right efforts. "It was taking three or four people to run our marketing campaigns, and everyone was doing it their own way," says Adams.

The organization wanted more than just a point solution—they wanted a platform that could function as the central hub for collaboration across departments, and one that could grow as the business grew. They needed technology to help them automate business processes, create more efficiency internally, and help track the customer experience throughout the entire lifecycle.

"It's like a symphony," says Adams. "Every detail matters, and if one detail is missed, one instrument is off, and it's not executed well."

SOLUTION

BMC worked with PowerObjects, an HCL Company, to implement a cloud-based Microsoft Dynamics 365 solution as a platform for collaboration across the company. As the leading partner of CRM services, PowerObjects helped BMC leverage the customer relationship management (CRM) capabilities of Dynamics 365 and implement a platform for automating business processes company-wide.

"We looked at our plan for the next five years, and one of the biggest savings on the IT side was a business decision to go on the cloud," says Adams. "I saw a one or two headcount that we'd be able to save by bringing all of the platform and pulling it into cloud."

BMC also decided to enroll in PowerObjects' unique service-as-a-subscription program, PowerSuccess, which provided a blueprint for effectively rolling out



*BISHOP-McCANN WORKED
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TO ROLL OUT A
CLOUD-BASED CRM
AND COLLABORATION
SOLUTION USING
MICROSOFT DYNAMICS*

365

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ROB ADAMS
CEO
Bishop-McCann

SOLUTION |CONTINUED|

the CRM system and continuing to fine-tune it to their needs.

This solution was designed with three areas of focus: people, processes, and systems. Based on this, PowerObjects worked with BMC associates from every department at the organization to determine how business processes could be built into the system and the design requirements around those needs.

BENEFITS

POWERSUCCESS

PowerSuccess is unique service-as-a-subscription program that allows organizations to implement CRM solutions without a large up-front cost of a traditional time-and-materials project. It allows organizations to work directly with a dedicated Success Engineer to decipher business requirements, create a plan for success, roll out the CRM solution, train users, and continue providing long-term refinements. "The PowerSuccess model provides a set cost model, a dedicated engineer resource and pre-built interface tools, says Adams. "The set cost model eliminates the surprise factor of a time and materials implementation. Our dedicated engineer helped to define the requirements, put them into action, and also understood the full implementation so additional requests were evaluated from an overall impact instead of just a single request."

POWERPACK ADD-ONS FOR CRM

As a part of the PowerSuccess program, BMC had full access to PowerObjects' suite of PowerPack add-ons for CRM that accelerate capabilities in sales, marketing, and productivity within the product. BMC's Success Engineer helped the organization evaluate which add-ons would help them automate their business processes and deploy as needed.

"The PowerPack tools are extremely valuable," says Adams. "We immediately put a few to work, and we continue to review additional tools as needed."

USER ADOPTION

User adoption factored into BMC's decision to go with Microsoft Dynamics as the solution platform. Since their associates were already familiar with Microsoft Outlook and other Office products, it was easy to train users in on CRM.

"I knew this was going to involve significant change management for the company, so I wanted to make sure that we had buy-in from our users," says Adams.



CHALLENGE

Bishop-McCann needed one platform to centralize and automate their business

SOLUTION

Bishop-McCann enrolled in the PowerSuccess service-as-a-subscription program to roll out Microsoft Dynamics 365 for CRM in the cloud.

BENEFITS

- + A centralized system for tracking customer history in real time
- + Automated and standardized business processes leading to huge efficiency gains
- + A full return on investment within 7 months of rolling out a new solution

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COLLABORATION - SKYPE, OFFICE 365, CRM

Utilizing the integration between Microsoft Dynamics 365, Office 365, and Skype, BMC employees can collaborate between departments to a degree that was impossible before the solution was rolled out. Skype allows employees to jump on a call and review documents in real time—a huge time-saver. “Every detail around a particular program or event is documented, creating collaboration that we never had before,” says Adams. BMC’s CRM also ensures that there is one source of the truth of customer history and interactions, in real time. “We can be confident now that when a customer tells us something, it’s documented,” says Adams. “It allows us to be able to have continuous improvement in our relationships. Those things in our industry are absolutely important. We never ask the same question anymore.”

CONFIDENTIALITY

In the event management industry, confidentiality is crucial, so PowerObjects helped BMC design their CRM to only show information on a need-to-know basis through security roles. “It was always a concern for us if an email was going out beyond just the recipient,” says Adams. “We’re dealing with confidential information that if leaked out to a competitor, could be extremely damaging. Now we have a one hundred percent confidence, one hundred percent of the time that all communication is only seen by the people that need it. And because of that, our customers trust us.”

EFFICIENCY

Prior to rolling out their CRM solution, BMC dealt with numerous efficiency issues. Tallying total spend for an event, or looking up critical event information, would sometimes have taken days to compile—and now it can be accessed with a click of a button.

“As an example, I recently needed to access hotel spend and how many rooms were booked for a particular customer,” explains Adams. “I my Microsoft Dynamics app on my phone, looked up the hotel partner, clicked the button, and my dashboard with all the critical information showed up. This helps me manage the relationship as I have all the information I need at hand.”

MARKETING

Bishop-McCann has seen a positive impact since they invested in Microsoft Dynamics CRM and their partnership with PowerObjects, including:

- 33% increase in qualified pipeline
- 11% Incremental business growth
- 20% decrease in marketing spend

Perhaps the most impressive statistic is that it only took Bishop-McCann seven months to break even with their investment. “What we’ve spent to date on the software and implementation has paid off in terms of value returned to us,” says Adams.

“When you’re in my role and you’re betting the company on it and you actually start seeing the results of the impact that it’s starting to make on your company, it’s huge,” says Adams. “I can see in people’s eyes that they’re getting a significant benefit.”



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