PRODYNAMICS

30%+

increase in client satisfaction scores (client-reported)

CASE STUDY · PROFESSIONAL SERVICES

30%+ higher client satisfaction for a professional services firm

The challenge

The firm's client processes in CRM had become complicated and inconsistent, and it showed in the client experience.

What we did

- Reviewed client-facing processes end to end, from first enquiry to ongoing service.
- Removed unnecessary steps and simplified how teams captured and used client information.
- Re-trained teams on the streamlined way of working.

The outcome

Client satisfaction scores rose by more than 30% after the CRM processes were streamlined.

What we'd add today, AI-first

We'd add Copilot to summarise client history in Outlook and Teams, and a service agent to draft responses for people to review.

INDUSTRY

Professional services

PLATFORM

Microsoft Dynamics 365 Customer Experience

SERVICES

Process re-engineering, CRM optimisation, adoption

RESULT

30%+ — increase in client satisfaction scores

Talk to us

Book a free 60-minute AI discovery session with a senior specialist.

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