

# Implementation of Microsoft Dynamics 365 to BDO Slovakia

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Digital transformation has brought BDO a new modern CRM solution  
for business management



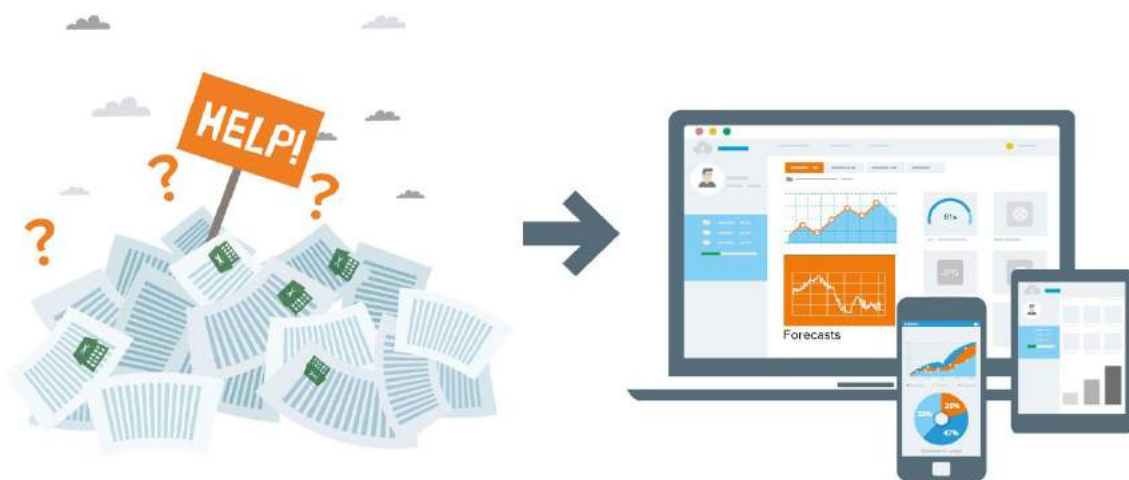
For our fast-growing company, it was absolutely necessary to implement an intelligent CRM solution. We are glad that we have decided for MS Dynamics 365, a scalable solution easily adaptable to our internal processes and containing various solutions. The new CRM system represents not only a tool for more effective client portfolio management, but also a tool for more efficient risk management.”

**Peter Gunda**  
Managing Partner

## Initial Situation

BDO used various Excel files and applications for its key data administration and management of business activities. However, they gradually became obsolete and did not promote effective customer service and company development anymore. Multiple data input into the separate applications and unproductive exchange of important information via emails were unacceptable in terms of time and administrative load of the employees.

Managers needed a tool providing them with better overview of their business. That was the reason why they decided to continue with the digital transformation of the company. Digital transformation plays an increasingly important role in remaining competitive. Based on the customer needs, we have implemented a new central business system consolidating data from multiple sources used by BDO till then.



## Customers' profile



**BDO Slovakia** provides its clients with unified and integrated auditing, accounting, tax and advisory services. It's a part of an international network of companies providing high-end services in defined areas. The BDO global network operates in 154 countries around the world with more than 1 400 offices and 63 400 employees.

## Description of the Solution

We have implemented to the BDO the **Microsoft Dynamics 365** solution and interconnected it with the **Microsoft Office 365**, already used by the company.

We have created a new interconnected business system with the following main **functionalities**:

- centralized management of client and contact data;
- recording of contact history and activities related to clients;
- employee work agenda management;
- tracking and evaluation of business opportunities;
- centralized management of project data;
- view on client and business data in form of charts;
- flexible document sharing;
- effective connection of the CRM directly with Microsoft Outlook or Word and Excel.

On top that, the selected CRM system offers a possibility of flexible development of any other future customer requirements.



## Project Objectives

**The main aim of the project was the delivery of a central CRM solution which would:**

- integrate existing applications into a unified system;
- enable management to easily track the current status of business;
- increase quality and efficiency of company management thanks to standardization of data structure, processes and document templates;
- ensure safe access to data from anywhere and any device, thanks to cloud;
- improve internal communication and cooperation on projects;
- eliminate multiple manual data inputs.

## Course of the Project

**The project was implemented in a short period of time thanks to two main aspects:**

1. The agile methodology of project management.
2. Maximum use of out-of-the-box functionalities of the solution with the aim to eliminate complex integrations and programming modifications.

Implementation of the solution underwent during June 2018. The Microsoft Teams application was extensively used as a collaboration and communication tool between Millennium and the customer.

## Thanks to the solution, the customer has gained the following benefits:

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1. Unified centralized system for management of key business activities of the company.
2. Effective tracking of the whole business process (from the lead, through business opportunities, to closing the deal).
3. Increase in productivity thanks to the access to information from anywhere and from any electronic device.
4. Elimination of business risks.
5. Ability to create comprehensive reports in future.
6. 360-degree view of customer data and communication history connected with Microsoft Outlook.
7. Generation of Excel reports without a need to manually enter the data.
8. Easy preparation of documents according to Word templates with automatically pre-filled data.

17x

Microsoft  
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→ Winner

 Slovak Republic

3x

Microsoft  
Industry Awards

→ Finalist

 Slovak Republic

4x

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## Are you interested in the solution?

If you want to know more about our solutions, contact us immediately.

We will pass your requirements and prepare the most appropriate solution for your company.

**Millennium, spol. s r. o.**  
Plynárenská 7/C  
821 09 Bratislava

[www.millennium.sk](http://www.millennium.sk)

+421 2 59 100 300  
[obchod@millennium.sk](mailto:obchod@millennium.sk)

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