

# Baskerville Drummond



Turning Dynamics into the ideal  
CRM document management solution

## Objective: Improve capabilities of Dynamics & SharePoint

As an innovator with the legal IT consultancy space, Baskerville Drummond provides a wide spectrum of client services with clients with an annual turnover of between £4 to 40m. The ethos of the organisation is to deliver IT strategy, project management, governance and vendor management in a unique client-focused manner - always being on the side of the law firm and working with outsourced partners to ensure they're doing what they promise to do.

Baskerville Drummond has forged a reputation in the legal market for being the IT consultancy firm which takes a problem and fixes it, dealing with the spectrum of everyday tactical issues to managing client senior level IT recruitment and overseeing legacy migration to new practice management systems. Above all, the organisation sits alongside clients as the trusted advisor, organically assisting and guiding IT strategy together with delivering tactical implementation.

To manage its growing business needs Baskerville Drummond needed a CRM document management solution which was able to track contracts and opportunities in projects in a more effective way than Dynamics and SharePoint were capable of doing and turned to DocDrive365 for the solution.

## CASE STUDY SUMMARY

### OBJECTIVE

Improve CRM capabilities of  
Dynamics & SharePoint

### THE APPROACH

Tried in-house solution and then  
considered the benefits of single piece  
of work vs low cost off-the-shelf App .

### MAIN CHALLENGES

How to get Dynamics & SharePoint to  
work together to create team sites.

### THE SOLUTION

Implement DocDrive365 after trial  
evaluation.

### THE RESULTS

Removed compliance risk across the  
estate and transitioned to a fully  
operational model within one month.

“ We needed a document  
management solution  
capable of tracking  
projects in a more  
effective way ”

REGULATOR DIRECTIVE

CASE STUDY  
DocDrive365

## **The Approach: Used an in-house solution, then considered single piece of work vs immediately available low-cost, off-the-shelf app.**

Baskerville Drummond have been using Dynamics 365 for nearly four-years and in the past had used an online Access database, hosted in Azure, to help with document management, however, Microsoft no longer supported this so they decided to fully embrace cloud-based Dynamics CRM.

At first, an in-house VB solution was considered alongside investing in a one-off piece of work, which would have required an initial investment of around £15k, plus time away from Baskerville Drummond's core business in developing the project scope. The VB solution simply didn't work and so it was decided that some further research was needed before committing to a one-off outlay.

After finding DocDrive365, Baskerville Drummond recognised that it would be able to fulfil its needs to better integrate Dynamics CRM and SharePoint to meet its specific needs, by using a lower-cost app-based product which came with the benefits of product enhancements, updates and support.

- ✓ **Intelligent document Management between Dynamics 365 and SharePoint**
- ✓ **Standardisation of document names between SharePoint sites and Team sites**
- ✓ **Automating document storage and tracking**
- ✓ **Understanding where all project documents are stored**
- ✓ **Having one interface for every project and quickly create and manage documents**

## **The Challenge: How to get Dynamics & SharePoint to work together to create documents in individual team sites.**

The solution needed to be capable of generating unique document numbering for contracts and Statement of Works across CRM. Even with a strong understanding of SharePoint and Dynamics, Baskerville Drummond couldn't understand how SharePoint could do this, because there's no control of document creation to be able to take documents out of Dynamics and store them in a team site.

David Baskerville says, "Dynamics has got our data, Microsoft provides SharePoint online, which is essentially what we were using in Teams and I couldn't believe that we're the only company with this problem; why can't I create a document and it appear in a specific team site."

# BASKERVILLE DRUMMOND

## Case Study: DocDrive365

### **The Solution: Implement DocDrive365 after trial evaluation.**

After viewing a working demonstration Baskerville Drummond trialled DocDrive365 and saw how every new engagement creates a SharePoint team site which can be shared in a controlled way with clients. DocDrive365 created the SharePoint sites and enabled the organisation to use simple drop-down functionality to write a new report or contract.

The DocDrive365 Workflow dealt with the demands of intelligent document nomenclature and seamlessly links documents between SharePoint and Dynamics, in the way that Baskerville Drummond initially envisaged.

DocDrive365 actively listens to client feedback and since working with Baskerville Drummond, some requested features have been built into the overall functionality of the product. Making DocDrive365 the ideal solution to document management for CRM within the Microsoft space.

### **CASE STUDY**

#### **SUMMARY IN NUMBERS**



#### **SPEEDS UP TASKS BY 1000%**

Some tasks which took half an hour, now completed in about 2-minutes.



#### **5-MINUTE TEMPLATES**

Creation of new templates with DocDrive365 takes only around five minutes.



#### **SECONDS, NOT HOURS**

Creates contracts and Statement of Works within sections, with unique reference numbers within seconds.

“ If it wasn't for DocDrive365 we would have given up on Dynamics ”

DAVID, BASKERVILLE DRUMMOND

# BASKERVILLE DRUMMOND

## Case Study: DocDrive365

“ There will still be a lot of organisations who are frustrated by not being able to manage documents when Microsoft is saying that Dynamics and SharePoint work well together ”

DAVID, BASKERVILLE DRUMMOND

**The Results:** The full power of Dynamics CRM was leveraged with DocDrive365, with just one click.

DocDrive365 enhances the way Dynamics CRM and SharePoint work together to make them work the way you'd want them to work. Baskerville Drummond believes that DocDrive365 has enabled them to leverage the power of the Microsoft CRM system that they were looking for.

David Baskerville asserts, "There will still be a lot of organisations who are frustrated by not being able to manage documents when Microsoft is saying that Dynamics and SharePoint work well together.

My view is that DocDrive365 is the glue which makes them a more useable solution."

David adds, "For example, when we need to set up a new project or engagement, the team site is set up instantly as we want it and we're able to instantly send out contracts or Statement of Works.

All in the click of a button. That opportunity is now a project. Before DocDrive365 it would have taken around 30 minutes to do this. All I can really say is, it just works and we're really pleased with it!"

**Learn more at**

[crmcs.co.uk/docdrive365](http://crmcs.co.uk/docdrive365)

## CONTACTS

### BASKERVILLE DRUMMOND

Challenge House  
Sherwood Drive  
Milton Keynes  
Buckinghamshire  
MK3 6DP

t: 01908 592570

### DocDrive365

CRMCS Ltd  
61 Oxford Street  
Manchester  
M1 6EQ

t: 0161 348 7360