



InVentry streamline their sales processes with the help of Dynamics 365 Sales and **Synergy Technology**



Microsoft Dynamics 365
Sales



Background

Based in Leeds, UK **InVentry Ltd** is the market-leader for sign-in and visitor management solutions. Established in 2010, the company has seen exponential growth over this period, culminating in being named in the Deloitte Global fastest 500 growing companies in technology in the EMEA region, the Northern Tech Awards Top 100 Fastest Growing Companies and being recognised among the LDC Top 50 Most Ambitious Business Leaders.

InVentry uses Microsoft Dynamics 365 Sales to streamline their customer relationship management processes and has been a Synergy Technology customer for around 3 years. **Tom Broadhead, Internal Sales Manager** at InVentry tells us more: "InVentry is the market leader for visitor management systems in education in the UK. Around 10,000 schools and academies use our touch screen system to manage everybody who's on site. We're best known for the visitor management system, but we do lots of other products that help identify who or what is in your building, when, where, and how."



Sustained Growth

InVentry has experienced huge growth in recent times. Tom thinks that this was due to having the right product for the marketplace at the right time. "I think we started the business at a good time. That was around 2010 when touch screen technology was first coming in and schools were starting to digitise the visitor management process."

Knowing who is on site at a given time is vital to ensure a safe environment for staff and pupils. "There's always been a very high need for safeguarding schools, especially for fire evacuations and knowing who's onsite and we offer both the hardware and software to make this possible with our industry leading solution" said Tom.

Changes in the data protection have also seen a growth in demand for InVentry's systems. "As GDPR came in, that helped us grow. Even through the pandemic, where being able to sign in in a contactless method was key. So with our system, schools were able to prebook visitors, know who's on site, and get those notifications out there."

Having become the leaders in the Education space, InVentry are now looking to grow the company's presence in other sectors. "We're really onto the next step now" said Tom "we're taking what we've learned in education and taking it into the corporate space. We have around 10,000 customers in education and growing, and thousands of corporate customers spanning a wide variety of sectors including manufacturing, health care, offices, venues, and many more."



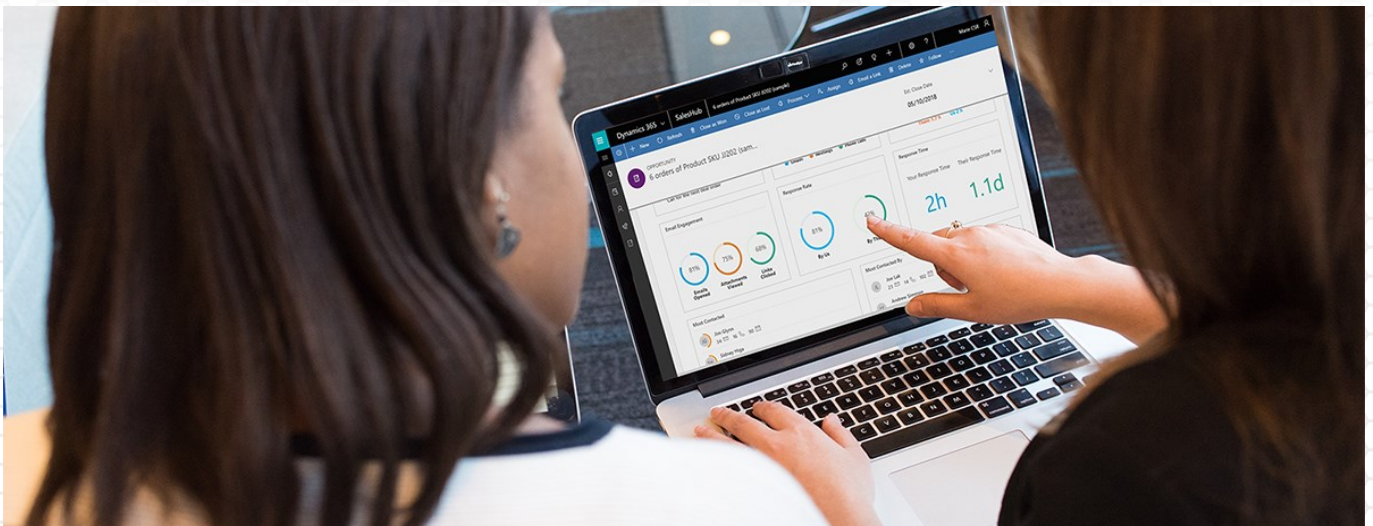
Expert Knowledge

The Team at InVentry is thankful to have the knowledge and experience of Synergy Technology to draw on, and Tom thinks working with a specialist in this area is better than simply trusting it to a general IT support provider. “Our business is dependent on it, so we really do need a specialist partner to be able to work with us to get the most out of it. We need the expert knowledge and it’s nice to be able to call on it when we need it.”

Streamlining Sales

Microsoft Dynamics 365 Sales gives Tom the visibility he needs to help manage the sales team more efficiently. “Dynamics is excellent for making sure we’re offering the best products to our customers at the right time.”

“With Accounts, Opportunities, Equipment, Projects and more all managed within there, it’s easy to manage internal teams to make sure they’re spending their time effectively. This in turn, makes sure our customers have the best experience with us.”



The system also makes it easier for the sales team to manage their own workload, and keep track of all their customers and opportunities. “The sales team can manage their pipeline easily through Dynamics and I can have full visibility of all their opportunities, which makes the whole thing quite seamless and easy.”

Seamless Integration

Tom thinks another good aspect of Microsoft Dynamics 365 Sales is the tight integration with the rest of the Microsoft suite. "One of the great things about it, is that it works with other Microsoft products, Teams, Outlook, Excel, PowerPoint, Word. Especially Outlook.

"Integration with the company's other internal systems is also key" says Tom. "Dynamics also connects with a few other systems that we've got. We use Dynamics 365 Business Central and Zendesk so it's basically in between every part of the business that we manage."



Responsive Support

Another thing that InVentry really rely on is the SynergyCare support service. "I use Synergy's Support quite a bit" says Tom "if it's something quite simple or generic, I'll just contact Matthew, our account manager via a Teams message, and he might be able to give me an idea on it. But then if it's something more complex, creating a support ticket, specifically with John (a Synergy Technical Specialist) is absolutely brilliant. "He really tries to understand the problem, the reason why you're doing whatever it is, then his explanations are very clear. They're quite fast getting back too, so yes, all the team have been brilliant so far."



Industry Experience

It's not just the day to day support that Tom has found useful. Synergy Technology have regular customer touch meetings, where InVentry can discuss how they are using the system, and how things might be improved.

“One thing we see as a great benefit of working with Synergy is being able to draw on their experience of working with other companies who are similar to ours and face the same challenges. When we propose a method to do something, Synergy might look at it and tweak it lightly and say ‘this could be a better method’ because of the knowledge they have from working with other similar companies. That’s really beneficial.”

Overall, the team at InVentry are very pleased with the help and support they have received from Synergy Technology. “Honestly, I’m really happy with the team there” said Tom “they’ve been great so far and the communication with them is has been brilliant.”



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