

# FMI Building Innovation modernise customer experience with Microsoft Dynamics 365

CUSTOMER  
**FMI Building Innovation**

LOCATION  
**Auckland, New Zealand**

INDUSTRY  
**Manufacturing**





## Challenge

- The need for a single customer view and complete visibility of interactions across multiple communication channels
- Ability for individual agents/teams to understand customer issues regardless of their involvement
- Improved accessibility to sales pipeline data



## Solution

- Microsoft Dynamics 365 Customer Engagement (Customer Service and Sales)
- Microsoft Power Platform (Power Automate)
- Microsoft Azure
- DXC implementation and support services



## Results

- Centralised, single customer view showing all communications, interactions, activities, account and contact details
- Structured workflow and defined steps for superior case resolution and optimised customer experience
- Significantly improved workplace collaboration with different agents able to pick up where others leave off



## FMI Building Innovation

FMI Building Innovation (FMI) is New Zealand's leading supplier of building innovation solutions. It began as Fairview Metal Industries in 1968, initially supplying steel windows from a small manufacturing plant. The brand has evolved to become a network of over 50 fabricators located across the country, offering customers an extensive range of exceptional window and door solutions, as well as producing cladding, fencing, glass balustrades, and other solutions.

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— **Peter Stark**  
Head of Services for FMI

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FMI also has four channel-to-market brands, Eurowood, Fairview, Next Windows and Doors, and Vetro Raccordi, supplying some of New Zealand's finest building materials for applications across thousands of homes and industries. FMI has become an industry innovator, always looking forward, pushing boundaries, and pioneering product improvements through sophisticated research and testing. Several of its products are designed in-house and manufactured locally - compared to many competitive products sourced from overseas.

### Business challenge

FMI is one of the largest building material companies in New Zealand, and is already an industry leader for

the energy and thermal efficiency of its windows and doors.

FMI's business-to-business (B2B) approach has a unique value proposition, with many customers commissioning equipment to design and manufacture products at their sites. The design software (intellectual property) belongs to FMI and has proven a game-changer in ensuring market leadership, value, and differentiation. It also allows customers to order materials electronically based on a software-generated bill of materials.

With sales and customer service teams suddenly required to work from home, the need for a consolidated picture of customer activity became critical. Different teams used disparate



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Systems Engineer and Head of  
Automation, FMI

and manual processes to track customer interactions and provide case management. A single customer view offering complete visibility of interactions and activities across multiple channels (like web, email and phone) was unattainable, and management could not easily view sales pipeline data.

With various teams managing different product ranges, most customers need to interact with multiple FMI agents. Each activity was specific to the agent they dealt with, and information was recorded across multiple Outlook mailboxes, the outdated Microsoft Dynamics AX enterprise resource planning (ERP) solution, and other internal methods. As a result, it was virtually impossible to gain a comprehensive customer profile, with agents facing difficulty ascertaining the status of issues or enquiries not initially handled by them. Team members had previously been able to resolve questions or concerns in the open office environment, but it became a major hurdle once agents started working remotely.

Adopting a digital-first strategy, FMI wanted any new technology to be hosted on Microsoft Azure, where appropriate. A core requirement of this company-wide strategy focused on providing a single centralised view of customer communications, regardless of which department or agent they dealt with. Peter Stark, Head of Services for FMI explained, “The initial key deliverable was to get every activity and interaction into a shared interface – with data commonly captured, coded and classified. We

wanted to improve our agents’ ability to support customers efficiently and effectively.”

## Solution

DXC Technology supported FMI in transforming their customer service environment to provide a single customer view for both the service and sales teams.

With a trusted relationship built over many years, the DXC Practice for Microsoft recommended FMI implement Microsoft Dynamics 365 Customer Engagement (Customer Service and Sales) to modernise their customer engagement operations, as well as the Microsoft Power Platform, particularly Power Automate, to improve integration and business process flows across multiple platforms.

Stark commented, “Our history with DXC goes back almost ten years, and our customers are mostly Microsoft shops. We are Microsoft users and committed to running anything we can on Azure, so it made sense to build upon that technology stack.”

Leveraging the existing Microsoft investment, DXC implemented two-way integration between Dynamics 365 Customer Engagement and Dynamics AX: with full case management, sales opportunity management, sales quote to sales orders, and synching customer master data. Automation of case creation from emails, workflow escalations and an automated sales rep call schedule were also achieved.

Andrew Kilpatrick, FMI's Systems Engineer and Head of Automation, said, "The DXC team was great to work with, truly knowledgeable and able to guide us on our journey. There were a few issues, but everything raised was overcome. Using standard Microsoft methodologies and pushing us to be as vanilla as possible helped us achieve an optimum outcome. We are now including that standard approach in our upcoming Dynamics 365 Finance and Operations implementation. The less customisation, the better - we'd rather adapt our business processes to fit a best-of-breed solution than the other way around."

## Results and benefits

With 16 sales and customer service employees utilising the solution daily, Dynamics 365 has enhanced business engagement and agility. FMI now benefits from a centralised view of every customer; the ability to assign communications, emails, and interactions; and a structured

workflow for an optimised customer experience.

Team members can retrieve customer contact details, pricing, account information, credit limits, sales orders and payment history, and raise sales orders quickly and easily via the single interface. While the solution focuses on existing customers, it also collects and stores prospective customer data, which can be classified and reported on for future use.

Furthermore, with information at their fingertips and the ability to access previous queries, agents have become empowered regarding the ability to answer customer queries: decreasing response times and delivering a consistent, enhanced customer experience.

Kilpatrick explained how the definition of best practice workflows helped improve case management, "Having clearly defined steps to follow when a particular case arises, and guidelines in place on how to handle certain situations, have helped significantly improve case resolution."



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FMI has also been impressed with the Power Platform’s ability to easily enable automation and accelerate processes: with the organisation committed to leveraging the low code / no code solution across the rest of the business. Stark said, “My team of non-developers can develop apps that add value to the business immediately. It’s exciting to be able to add that value so quickly and easily across a range of different areas.”

## The future

This project reinforced FMI’s relationship with DXC and its role as a trusted partner. Longer-term plans include improvements to the customer view; better classification and control of data capture and presentation; email/e-marketing for automated

communications; and other advanced sales and marketing functionality.

Stark concluded, “We’re not yet taking advantage of Dynamics 365 Customer Engagement’s full potential, having only just dipped our toe in the water; however, we see real value and many more benefits to come in the next phase. We plan to extend the use and integrate with our new ERP (Dynamics 365 Finance and Operations) and may also consider tracking cases and response times with drill down to more detail.

“We look forward to working with DXC in the next phase of our transformation and digital-first strategy.”

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