



Brunel

Customer Success Case Study

Brunel Optimizes Worldwide Document Generation from CRM

Brunel is an international service provider specializing in the flexible deployment of talent, knowledge and capacity. The organization's services include recruitment and HR services, global mobility, health, safety and environment consultancy, as well as vendor management.

Challenge

With their own network of 106 branch offices in 37 countries, Brunel is a large organization operating a broad variety of systems and document templates in many different languages. To streamline internal processes, optimize document creation and generation, and improve document consistency, Brunel required a centralized approach to the flow of documents they were producing every day.

They decided to consolidate their worldwide recruitment operations and associated document generation tasks on Microsoft Dynamics CRM. Experlogix Document Automation – an easy-to-use document generation solution for Dynamics 365 – was the right answer to their challenges.

Brunel

Product

- Experlogix Document Automation

Benefits

- Improved document consistency
- Accelerated document processes
- Increased efficiency

Tech

- Microsoft Dynamics 365

Solution

Optimizing the Entire Recruitment Process

Brunel's recruitment services team uses Microsoft Dynamics CRM and Experlogix Document Automation throughout their many business processes. For instance, they create a profile of every candidate or consultant in the Microsoft platform. Then with Experlogix Document Automation, they generate a personalized resume for each profile – the resume is based on a Brunel-branded template previously built by the company's business users with the comprehensive and intuitive Experlogix Template Builder add-in for Microsoft Word. Hired candidates receive an employment contract automatically generated through Experlogix Document Automation for Dynamics 365.

The assignment contracts as well as any correspondence regarding initialization, renewal, or termination of assignment are also produced using the solution. With one or two clicks from the Experlogix interface, these documents incorporate personalized information stored in Brunel's Dynamics CRM environment and are rapidly delivered to the appropriate candidates.

Centralized Template Management

Brunel maintains a couple of hundred templates, which are stored on their central corporate servers and managed by their IT team. With Experlogix Document Automation for Microsoft Dynamics 365, preapproved templates are pulled from these centralized repositories, so the recruitment services employees are confident that the documents they generate are compliant and consistent across the organization.



Result

Consolidating their global recruitment operations and document generation processes on Microsoft Dynamics CRM and Experlogix Document Automation enabled Brunel to optimize document creation and generation from a single, intuitive solution, and increase internal efficiency with automated technologies. The centralized approach to template management improved document consistency, by controlling the templates used across the company.

The seamless integration of Experlogix Document Automation with Microsoft Dynamics CRM facilitated adoption of more than 1,000 users at Brunel; users could easily execute their document generation tasks in the familiar Dynamics CRM experience. They appreciated the level of support they received from the Experlogix team, who maintained short communication lines and provided quick answers.

Brunel is exploring ways they can further rationalize document generation and management – such as creating documents from CRM workflows and building re-usable composed templates – to be even more efficient with the Experlogix Document Automation solution.



“The leap forward we made in terms of user productivity, document consistency and template manageability is astonishing.”

Simon Wit
CRM Manager

Want to learn more?

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