

The background of the top half of the page features a stylized, abstract illustration of a plant or tree. The leaves and branches are rendered in various shades of yellow and orange, creating a warm, organic feel. The overall composition is layered and textured.

**risual**

Oxygen Finance meets demand for more automated and agile systems

# The customer profile

## Website:

<https://www.oxygen-finance.com/>

## Region:

Birmingham

## Industry:

Finance

## Profile:

Oxygen Finance are a business, with a key focus on growth. As a growing business who now hold over 30 clients, completing manual and labour-intensive tasks manually was simply no longer efficient and would have caused strain on the benefits and potential of the business.

# The background

Oxygen were keen to focus on multiple aspects when looking for a solution, their desire was to find a solution that would give them the ability to grow the business through digitally transforming. It was clear that Oxygen wanted enablement to be able to formalise and scale their business, by focusing on key aspects:

- Data Protection
- Client Protection
- Manageable solutions on how the data is managed
- Scalability
- The ability to manage large amounts of data from various sources
- Accessibility

# The challenge

As a business going through a big time of growth it was clear to Oxygen that some crucial changes needed to be made. With growth of over double in their client base over 3 years it was clear that the old processes, manual tasks, and one-off jobs would not work with the growing business.

One of Oxygen's largest challenges was their CRM system. The challenge was the scale of data that had to be managed. With the rapid growth of the client base, Oxygen found themselves managing over ten times the data they had managed previously. The acceleration in their growth also meant the increase in the amount of client suppliers they were working with too. Typically, an Oxygen client has thousands of suppliers, bringing all this data together and managing this was a challenge with the growth of the business.

Further to this, Oxygen had also been going through elements of platform alignment, they are a big user of O365 and wanted to align the rest of their technologies onto the Microsoft stack. Oxygen's original CRM System, Sales Force, was built to specific business needs which come the new growth were now redundant. The business mould became difficult to operate and to keep updated. With the growth of the business their came new requirements and the old system just could not fulfil them. It was time for change.

**"The business is always going to be changing and growing, we needed a system that would adapt and change with us and with our company, risual found that solution for us and implemented it successfully."**

**Rob Parker**  
**Chief Technology Officer at Oxygen Finance**

# The solution

One of the main obstacles that was faced was time. With the sign off complete in late October and the Sales Force license expiring mid-December there were two options. The first was to stall the project and wait until the Sales Force expiry deadline. The second was to deliver version one and make continuous improvements. Oxygen embrace the agile way of working and agreed to the second choice. It took a couple of months to get the project from signed off to live – all the data was migrated and operating successfully within the business.

With the needs of Oxygen changing and a demand for a more automated, trusted, and agile system Oxygen began the search for their solution. In essence, Oxygen were looking for a company who appreciated how they worked vs how they needed to work and perform this in a lightweight delivery rather than the heavy-handed consultancy model.

Oxygen ensured their digital strategy document was shared with risual, this sets out the elements and criteria to the alignments Oxygen wanted. The decision was made to go with a MS Dynamics solution, and risual was the provider to work with.

Moving forward, Oxygen had to work with a blank canvas – the new CRM.

*“risual are a Microsoft Gold Partner, which allowed us to see their potential and to know that they have proven expertise. Microsoft had put their faith in them and so it gave us the confidence to do the same.”*

**Rob Parker**  
Chief Technology Officer at Oxygen Finance

# The visual relationship

“Personally, I am a technical leader, and with that I like to work with organisations who are also technical in their nature. risual’s nature is to get their hands dirty, work hands on with the technology. That’s what made risual different.

risual hosted multiple sales and early solutioning sessions in which they went into great detail into sharing their knowledge. risual made sure they understood our requirements, and this was key to our success, the sessions allowed us to collaborate and create a solution for success.”

Rob Parker  
Chief Technology Officer at Oxygen Finance

# The risual education scheme

risual identified a need for a comprehensive IT apprenticeship scheme once it became clear that the digital skills gap across the UK is getting wider. The risual education programme was designed to support businesses and employers across the county to grow and develop a skilled workforce which will bring a wealth of knowledge and digital skills, whilst helping grow the next generation of talented staff for the business. risual education have pledged to have a risual Microsoft Academy with a Microsoft Showcase classroom at a partnered college in each region throughout the UK which will also support every business who wishes to grow through training and developing apprentices.

Oxygen's success with risual left them wanting more risual-minded people in their business. As their client base was growing, so was their staff, they wanted fresh talent and people with digital skills to fit into their Modern Workplace. An IT Infrastructure Apprentice was placed within Oxygen Finance, who is now thriving working full-time 4 days a week and having one day studying his Level 3 Infrastructure NVQ at Walsall College.

**"We wanted to collaborate with a company we trusted to help us get the right people in the right roles and we are glad to say risual was that company. They supported us in finding the right apprentice and making sure both him and us were happy."**

**Rob Parker**  
Chief Technology Officer at Oxygen Finance

# The benefits

Once the project was complete, Oxygen saw genuine business benefits that worked with their growing business. The company was making use of Power BI within the organisation but also providing clear processes to its clients. The business requirements were met, and Oxygen is now prepared to grow and develop further.

## Reporting

PowerBI was used to create live reports on displays throughout the business. People were seeing their results instantly and this improved the company-wide reporting and employee engagement. As part of the solution, we can also track people working in the offices and from home, including both the UK and the US.

## Speed

As a business with over 130 million invoices we used the new system to integrate with our clients to ensure swift delivery. Also, with the latest technology we were seeing the data changes daily, allowing our business to react more quickly and more effectively than before.

## CRM

In true Modern Workplace style, the CRM integrations with the O365 suite were sent to employee's phones, dynamics apps, and laptops. This allowed Oxygen to work more collaboratively, more effectively, and more accurately.

## Automation

Using Flow and numerous O365 apps employees of Oxygen were now able to manage their own workloads with the confidence of automation and concise reporting at their back. Giving the workers the freedom to stop firefighting on reports and statistics and return with innovation to their roles.

## Control

Dynamics has been set within the MS estate, ensuring that securing the platform is centralised, simple and full integrated with other systems. Also, that access management can be managed from a single point of contact to control and regulate admins, users, and special accesses.

## CSP

With the centralisation of everything on the MS stack, it made more sense to have all licensing work in the same way. risual helped Oxygen manage their licensing alongside their platforms to ensure growth remained a key part to the business.

**"Power BI has been an immense success throughout the whole organisation, giving our employees clear and correct reporting live all the time! We wouldn't have the autonomy or the motivation we have now if it weren't for them."**

**Rob Parker**  
Chief Technology Officer at Oxygen Finance

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