



Centric's D365 Sales + Customer Insights Enablement



Strategy, Setup & Success

Accelerate your customer engagement and sales effectiveness with Centric's proven consulting services for Microsoft Dynamics 365 Sales and Customer Insights. Designed for mid-market and enterprise organizations, this offering brings together CRM best practices, personalized engagement strategies, and AI-powered sales tools to drive ROI across your marketing and sales lifecycle.

Why Centric?

- **Business-First Approach:** We focus on real business outcomes, not just technology deployments.
- **Unified Customer Engagement:** Our experts bridge the gap between marketing automation and sales execution using real-time insights.
- **AI & Copilot Readiness:** Activate Sales Copilot, predictive insights, and next-best actions to empower sellers.
- **Accelerators & Templates:** Leverage Centric IP for faster time to value.
- **Adoption & Change Management:** Proven enablement strategies
- to ensure sustainable CRM success.

1-Week Assessment

- Stakeholder interviews and current state review
- Sales and marketing alignment workshop
- CRM and Customer Insights readiness scorecard
- Use case prioritization and roadmap

4-Week Quick Start

- Core setup and lead-to-opportunity configuration
- Integration with Customer Insights (basic profile unification & segmentation)
- Copilot activation and training
- Sales dashboards and performance metrics
- User onboarding and training plan

Custom Engagement

- Custom Configuration or Development
- Integrations
- Advanced segmentation and journey design
- Data migration and enrichment
- Custom reporting and KPI dashboards
- Account-based marketing and sales playbooks
- Ongoing managed services



Key Benefits

Centric's enablement services improve lead quality and sales velocity, personalize engagement across touch points, and empower sellers with actionable insights. By increasing user adoption through comprehensive training and governance, organizations can maximize their ROI on Microsoft investments.

Ideal for organizations with

This offering is ideal for organizations with an existing or new D365 Sales environment, an interest in unifying CRM and marketing data, a need for sales and marketing alignment, and goals to adopt AI and predictive selling.

About Centric Consulting

Founded in 1999, Centric Consulting is an international management consulting firm with over 1,400 experts in digital, technology, and business consulting.

Centric is dedicated to delivering unmatched experiences and solving the toughest business problems for organizations of all sizes.

Centric Consulting

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