

## FUEL GROWTH: D365 CUSTOMER ENGAGEMENT + COPILOT

### D365 CE + COPILOT STRATEGY

Transform your sales, service, and marketing teams with a **single platform built for results.**

#### THE PROBLEM

Too many organizations rely on disconnected systems and manual processes that slow down teams and keep leaders in the dark. CRMs are often viewed as glorified databases - not the strategic drivers they should be.

- **Your business evolves - your CRM should too**
  - When teams change, markets shift, or strategies pivot, your CRM needs to keep pace

#### ? WHAT IF YOU COULD

- Automate key sales and service workflows
- Get real-time visibility into performance metrics
- Eliminate swivel-chair tasks and duplicate data
- Empower frontline teams to do more with less
- Align your people, process, and technology - on one platform

#### WHAT WE DELIVER

We help businesses rethink and rebuild how they engage customers - **from first touch through long-term loyalty.**

#### FOCUS AREAS

- **Sales Acceleration:** Smart lead routing, pipeline visibility, and actionable insights
- **Service Excellence:** Case automation, technician enablement, knowledge sharing
- **Marketing Impact:** Targeted outreach, campaign insights, lead capture automation
- **Process Automation:** Approvals, alerts, tasks, and integrations — all low-code
- **Analytics & Copilot:** Custom dashboards, forecasting, and Copilot AI to guide action
- **CRM Optimization & Redesign:** We assess what's working, what's not, and rebuild to align with your current business strategy



#### WHY DYNAMICS 365 CE?

- Because it's more than a CRM, Dynamics 365 CE is built on Microsoft's Power Platform, giving you the flexibility to adapt fast, automate easily, and scale as your business changes.
- **It adapts to your business - not the other way around**
- Your team gets automation. Your leaders get insights.
- **You get results.**

#### LET'S TALK

##### Schedule a Solution Strategy Session

- Join us for a short, scenario-based walkthrough of Dynamics 365 CE - no tech-speak, just outcomes. See how modern sales, service, and marketing teams automate the right things, track the right KPIs, and win faster.

##### Book a D365 CE Optimization Session

- Already using Dynamics 365 CE? We'll listen, review your current setup, and walk through where the gaps are - then show you what a modern, optimized CE environment can look like.
- Think of it as a second opinion - with real solutions.