



ORBIS ENERGY & UTILITIES

Innovating your Business Processes

01

ORBIS SE – SHORT FACTS

02

OUR SOLUTION STRATEGY

03

CUSTOMER JOURNEY & USE CASES

04

INSIGHTS INTO OUR SOLUTION

05

HOW TO START / GET IN TOUCH

OVERVIEW – ORBIS SE



**Founded
1986**



**Technology Partners
Microsoft und SAP**



ORBIS GROUP

Growth from 25mn EUR Revenue in 2010 to 132mn EUR in 2024



AWARDS

Microsoft partner of the year and Member of the INNER CIRCLE



3,000+

Completed Projects



ORBIS Group

1000+ employees



530+

Active Customers



**Microsoft
Solutions Partner**



ORBIS SE 2024

~ 132 m € Turnover
49 % Equity Ratio



**20 Locations on
3 Continents**



ORBIS is your partner for digital transformation. We advise, integrate, optimize and automate processes ... based on the solutions and technologies of our partners Microsoft and SAP as well as our own solutions.



ORBIS MICROSOFT BUSINESS AREA



LOCATIONS

- » 21 locations on 3 continents
- » Europe, USA & China



CUSTOMER ENGAGEMENT with MICROSOFT DYNAMICS 365

DIGITAL TRANSFORMATION

- » for Marketing, Sales & Services
- » CoPilot



INDUSTRY PRIORITIES

- » Discrete manufacturing
- » Automotive supplier
- » Construction supplier & Wholesale
- » Cross industry (Consumer, Retail, Logistics...)



EXPERIENCE

25+ Years of CUSTOMER ENGAGEMENT Experience

Change Management



OUR TEAMS

- » 350+ MS Consultants, Developer & Experts
- » 1500+ Projects
- » Dedicated team with extensive experience in industry processes



TAILORMADE SERVICES

- » Best practice ISV solutions
- » D365 Industry templates
- » Innovative consulting offers



BUSINESS VALUE (Value +)

- » Data-based process transformation
- » KPI-based value realization
- » Organizational impact consulting



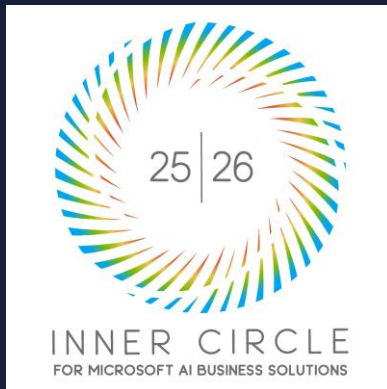
PARTNERSHIP

- Leading PARTNER in Europe for
- » Microsoft Customer Engagement & Power Platform
 - » Microsoft Catalyst
 - » FastTrack Ready Partner



AWARDS

- » Member of the INNER CIRCLE 2025/2026
- » 5 FastTrack Recognized Solution Architects
- » MVP Business Applications



MICROSOFT POWER PLATFORM

- » Professional low-code / pro-code approach for LOB applications
- » Proactive Insights & BI

MODERN COMMUNICATION & COLLABORATION with M365

CLOUD DEVELOPMENT BASED ON AZURE

- » Cloud Native
- » IaaS / PaaS / SaaS
- » Azure AI & Agentic

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HOW TO START / GET IN TOUCH

What are the expectations
of customers, companies,
and employees?

CUSTOMER EXPECTATIONS ARE HIGHER THAN EVER

64%

of customers want companies to respond more quickly to their changing needs¹

46%

of customers consider a personalized experience to be important for their purchasing or decision-making process²

32%

of customers are willing to leave a company if they have inconsistent experiences³

¹Accenture. ["The human paradox: From customer centricity to life centricity."](#) July 2022.

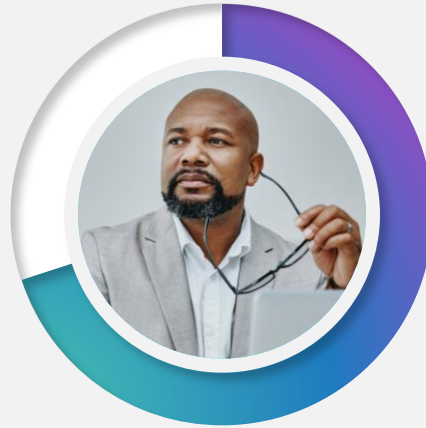
²Forbes. ["Top Customer Experience Trends In 2024 – Forbes Advisor."](#) August 2023.

³PwC. ["PwC Customer Loyalty Survey 2022: Why customer loyalty is important."](#) May 2022.

TODAY, COMPANIES ARE OFTEN UNABLE TO MEET CUSTOMER EXPECTATIONS



61% of corporate marketers find it challenging to create the right content for their audience¹



Sales representatives spend 70% of their time on administrative and non-sales tasks²



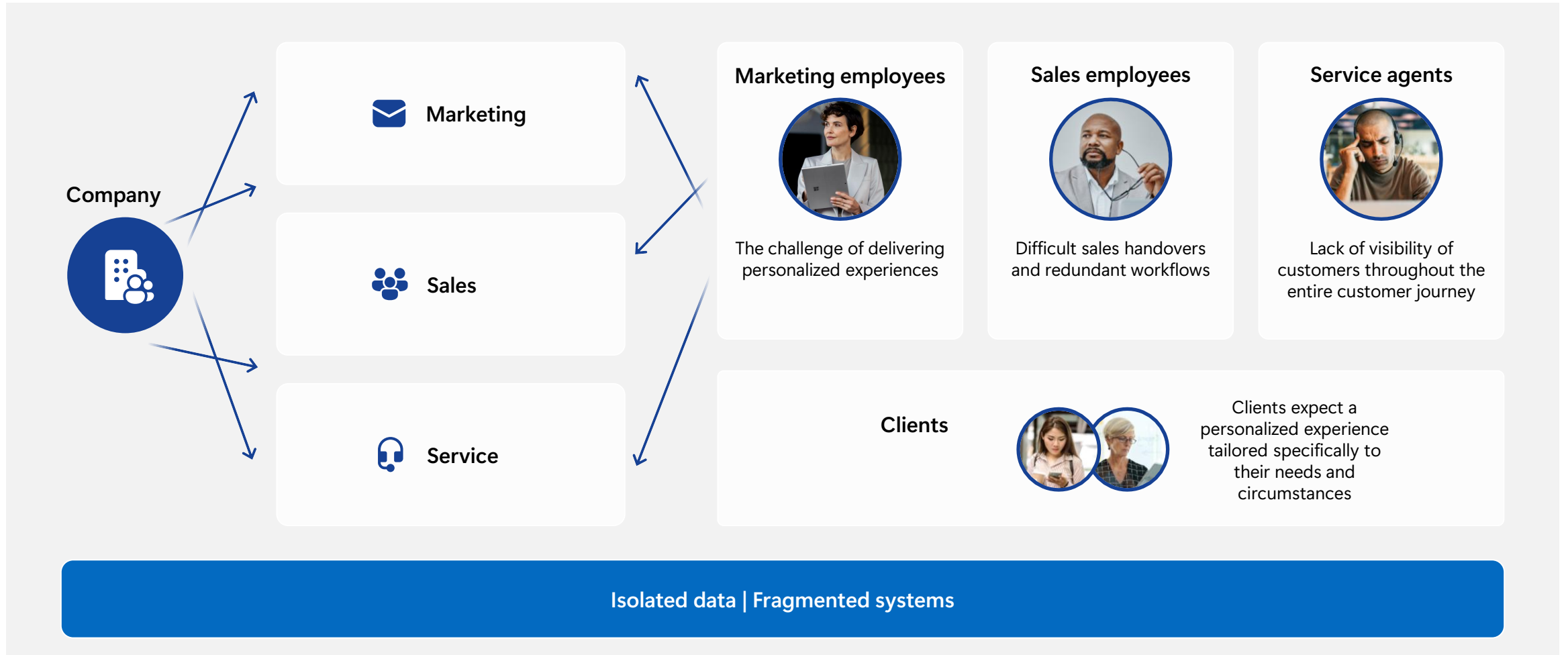
71% of service agents spend too much time looking up answers to customer questions³

¹Content Marketing Institute. "[Enterprise Markets Leading With Strategy in 2024](#)." 2024.

²Microsoft-sponsored Futurum Research. 2022.

³Customer Contact Week Digital. "[2023 May Market Study: Generative AI & Chatbots for Customer Contact](#)." 2023.

DISPARATE SYSTEMS AND DATA SILOS LEAD TO DISSATISFIED AND FRUSTRATED CUSTOMERS AND EMPLOYEES




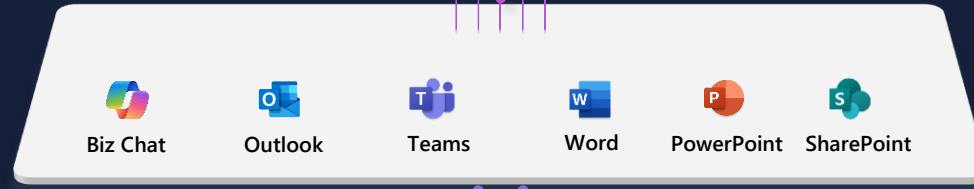


How can
ORBIS Energy & Utilities
help with this?

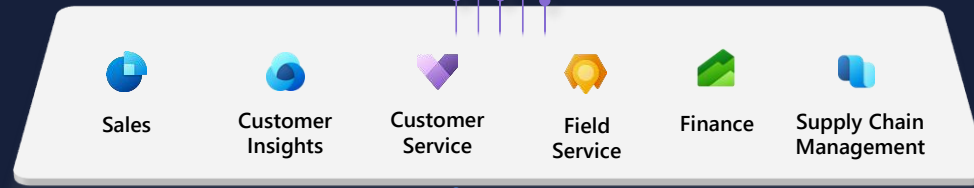
MICROSOFT ECOSYSTEM



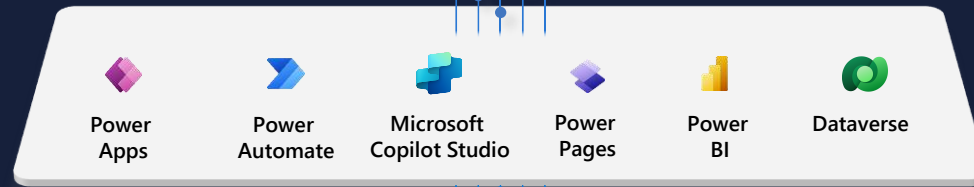
 **Modern Work**
UI for AI



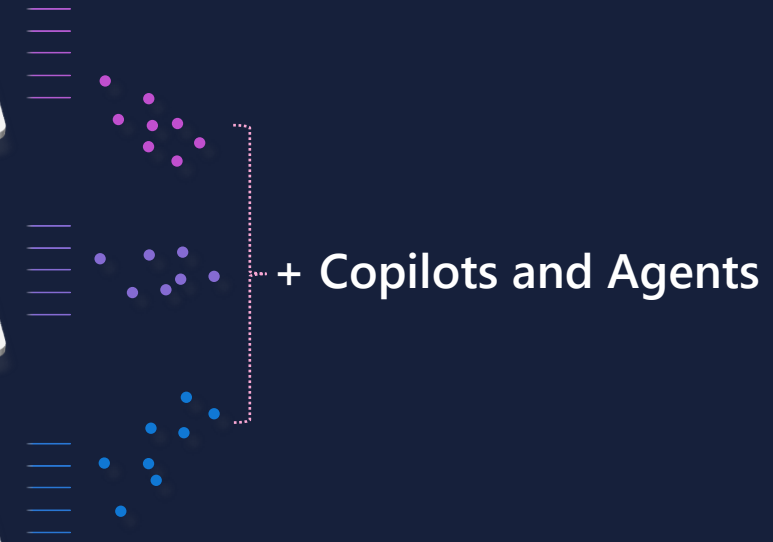
 **Dynamics 365**
Unified CRM & ERP



 **Power Platform**
Low Code → Pro Code



 **Azure**
Microsoft Cloud



ORBIS ENERGY & UTILITIES VALUE PROPOSITION

 Microsoft Dynamics 365



 Microsoft Power Platform

Sales, Service & Marketing

Industry-specific end-to-end processes for B2B and B2C business units based on Microsoft Dynamics 365 business applications and Microsoft Copilot

Modern Work

Platform, Productivity, and Transformation. Change Management to Navigate Digital Transformation in the Enterprise



 Microsoft 365



No Code & Low Code Add-Ons, Reporting, Portals, etc.

Customized solutions to support digital transformation. Governance, Center of Excellence, etc., as well as customized coaching

Integration into industry processes

Integration of industry-specific ERP and billing systems, with a focus on SAP IS-U and S/4HANA Utilities. Standardized interface technology as the foundation for further integrations.



ORBIS ENERGY & UTILITIES DIGITAL INDUSTRY EXCELLENCE



SPECIALIZED CONSULTANTS WITH EXPERTISE IN PROCESSES, TECHNOLOGY, AND INDUSTRY KNOW-HOW



INDUSTRY-SPECIFIC SALES PROCESSES WITH MICROSOFT DYNAMICS 365 SALES



INTEGRATED SERVICE PROCESSES WITH MICROSOFT DYNAMICS 365 CUSTOMER SERVICE & FIELD SERVICE



ORBIS IS AN EXPERIENCED MICROSOFT DYNAMICS 365 PARTNER FOR SALES, SERVICE AND MARKETING PROCESSES



MARKETING AUTOMATION WITH CUSTOMER INSIGHTS JOURNEY, TAILORED TO SPECIFIC INDUSTRY USE CASES



STANDARDIZED INTEGRATION OF INDUSTRY-SPECIFIC COSTING, BILLING AND CORE SYSTEMS



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ENERGY & UTILITIES CUSTOMER JOURNEY



Touchpoints & Marketing



Sales



Service



Billing Integration

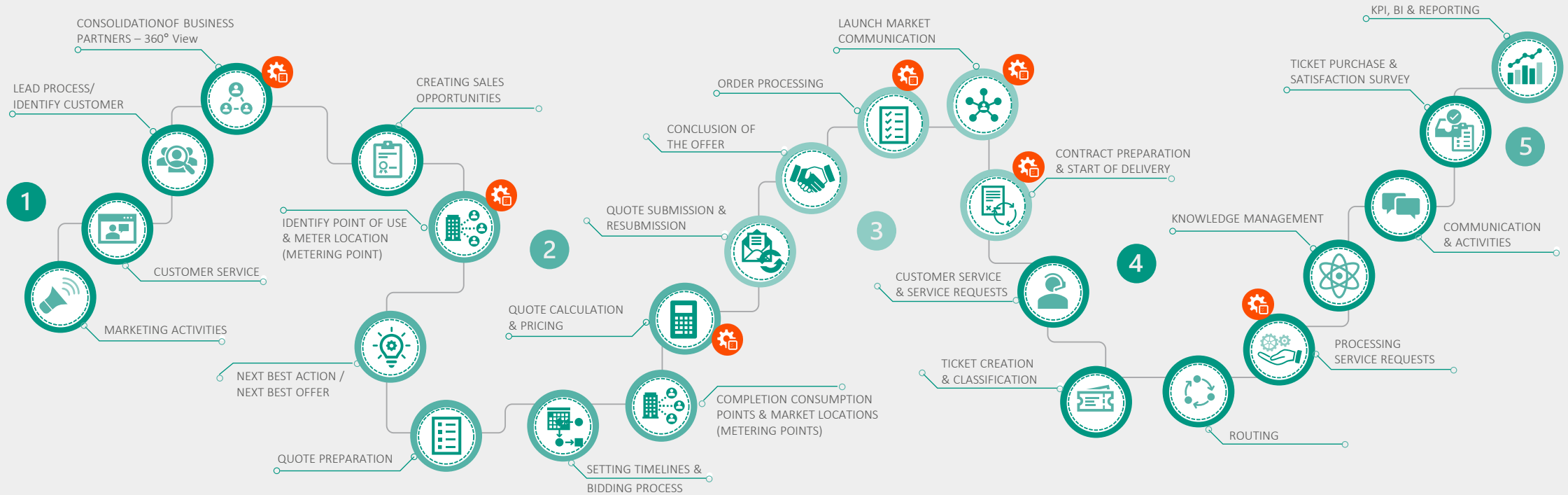


Field Service



Analysis & Reporting

- Email
- Portal
- Phone
- App
- Live Chat
- Bots & IVR



ORBIS ENERGY & UTILITIES - LET OUR EXPERIENDE GUIDE YOUR CUSTOMER JOURNEY!

Awareness & Consideration

Interaction with customers across multiple touchpoints. A 360° view of the customer and consolidation of business partners.

Evaluation

Sales opportunities by division, industry-specific sales processes for B2C and B2B.

Purchase & Delivery

Order processing, integration of a billing system for market communications, and contract management.

Utilization & Service

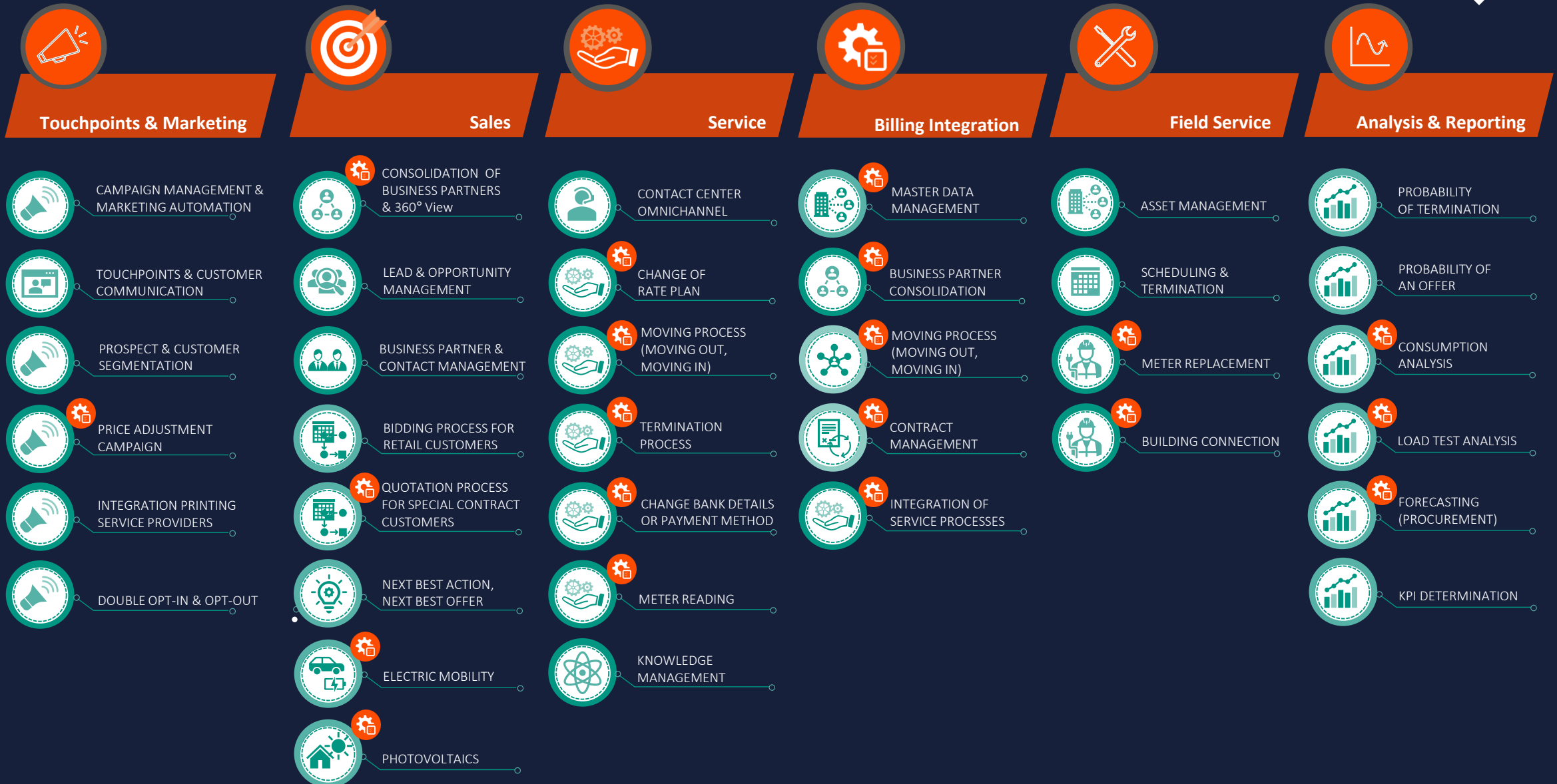
Customer service and industry-specific service processes integrated with the billing system.

Advocacy

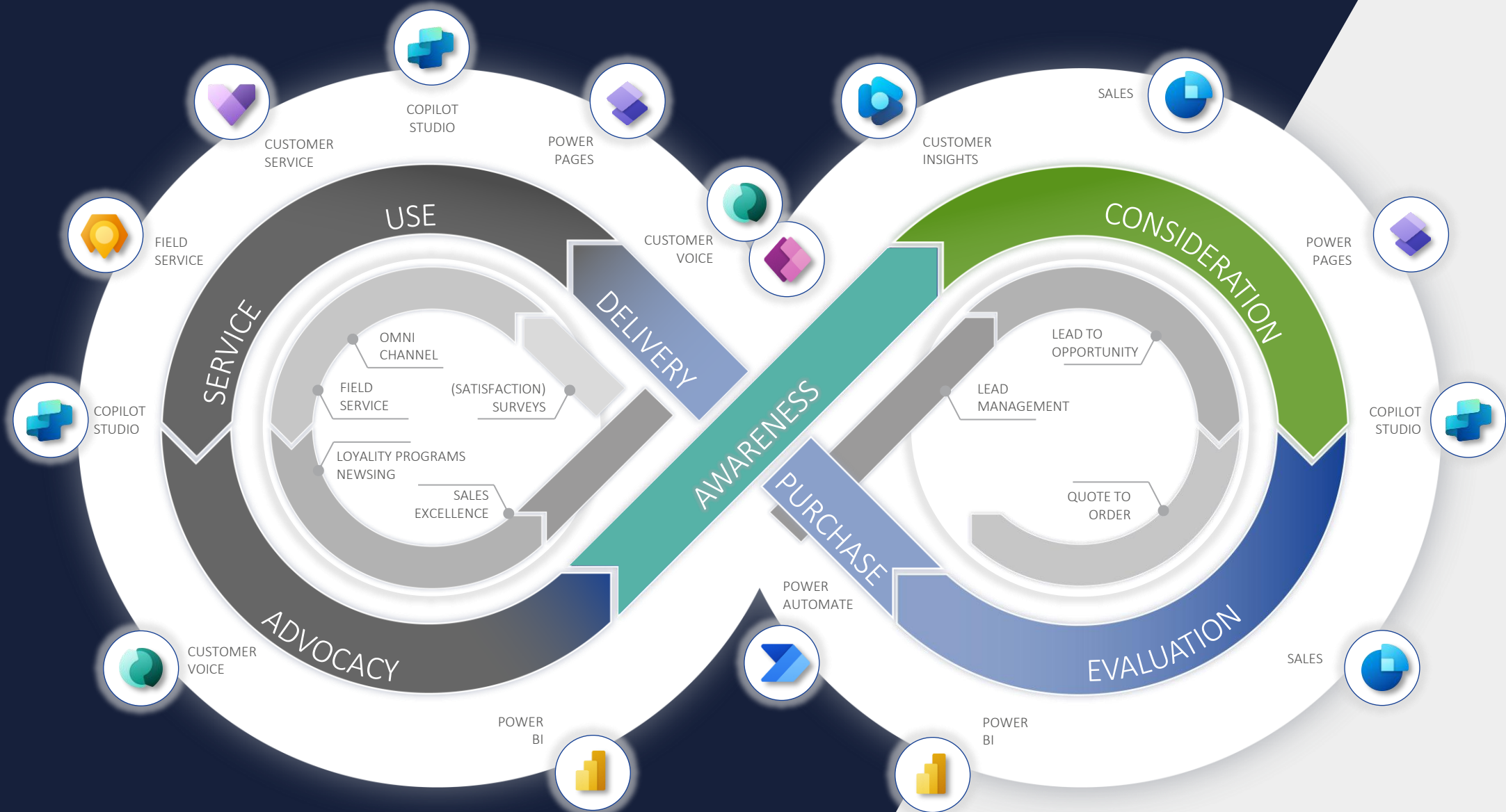
Customer retention, marketing automation based on industry-specific analytics and reporting.

INTEGRATION

ENERGY & UTILITIES – USE CASE OVERVIEW



CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



Touchpoints & Marketing

 CAMPAIGN MANAGEMENT & MARKETING AUTOMATION

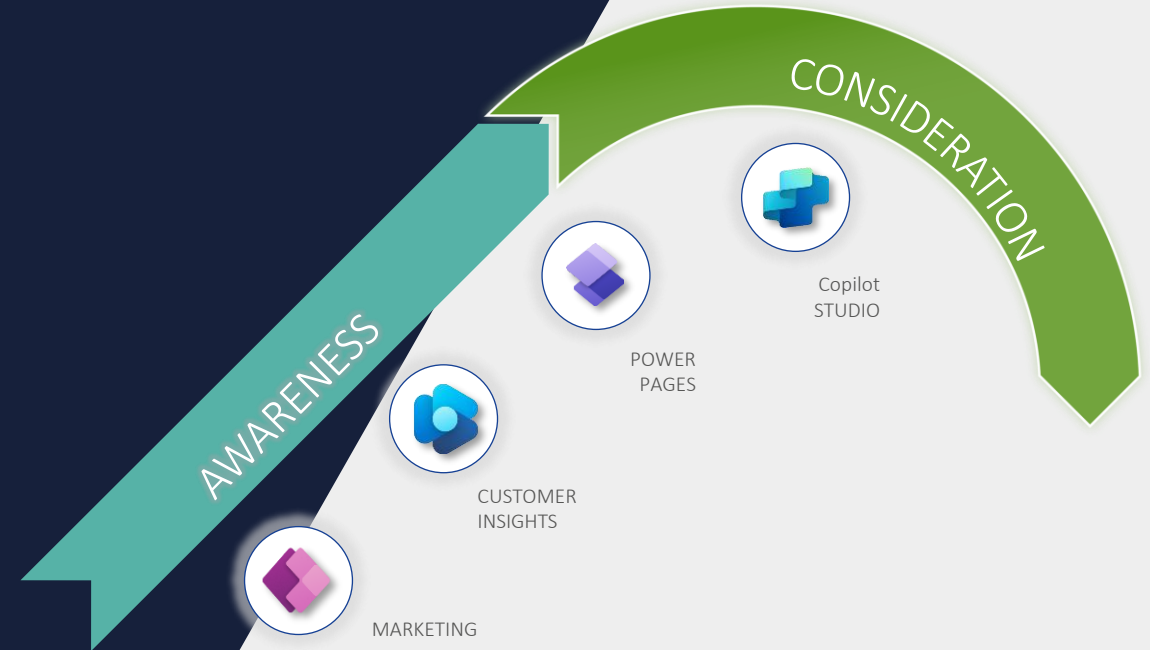
 PRICE ADJUSTMENT CAMPAIGN

 TOUCHPOINTS & CUSTOMER COMMUNICATION

 INTEGRATION WITH PRINTING SERVICE PROVIDERS

 PROSPECT & CUSTOMER SEGMENTATION

 DOUBLE OPT-IN & OPT-OUT



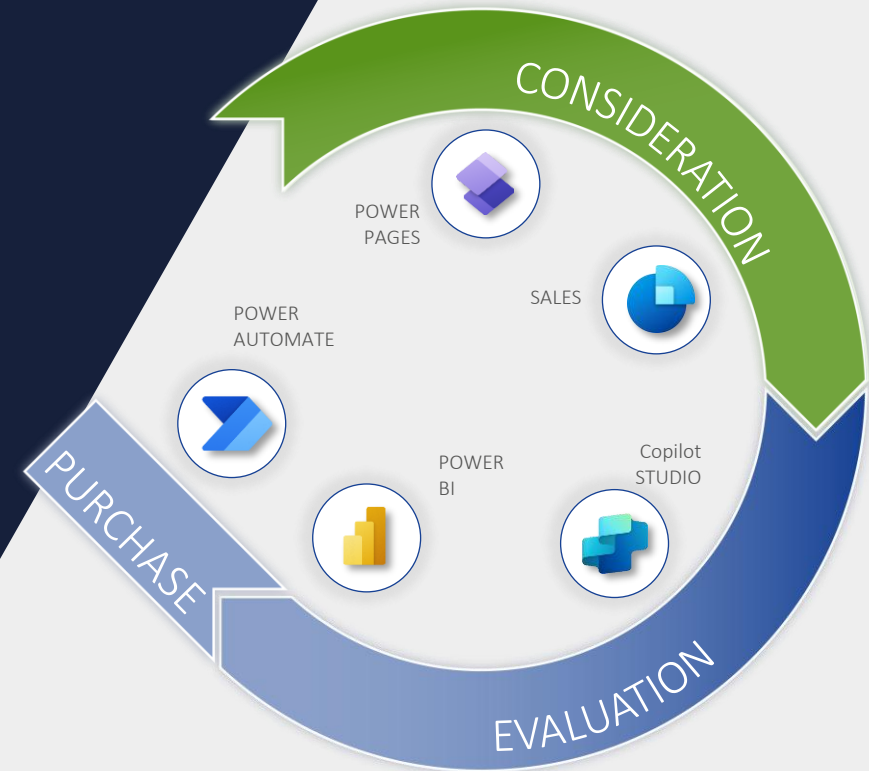
CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



Sales

-  CONSOLIDATION OF BUSINESS PARTNERS & 360° VIEW
-  LEAD & OPPORTUNITY MANAGEMENT
-  BUSINESS PARTNER & CONTACT MANAGEMENT
-  BIDDING PROCESS FOR RETAIL CUSTOMERS

-  QUOTATION PROCESS FOR SPECIAL CONTRACT CUSTOMERS
-  NEXT BEST ACTION, NEXT BEST OFFER
-  ELECTRIC MOBILITY
-  PHOTOVOLTAICS



CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



Service



CONTACT CENTER
OMNICHANNEL



CHANGE OF
RATE PLAN



MOVING PROCESS
(MOVING OUT, MOVING IN)



TERMINATION PROCESS



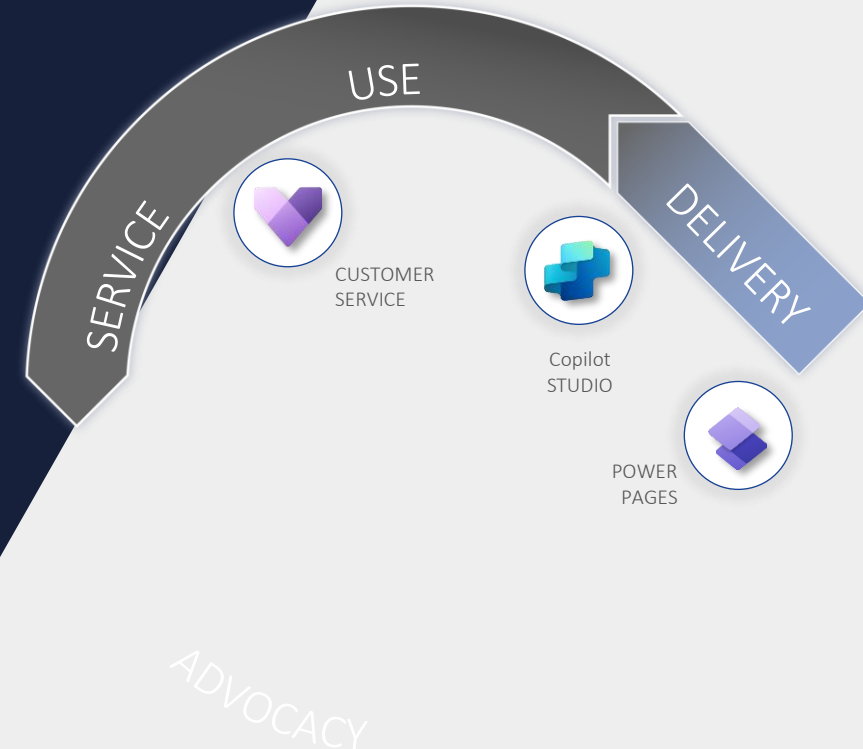
CHANGE BANK DETAILS
OR PAYMENT METHOD



METER READING



KNOWLEDGE
MANAGEMENT



CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



Field Service



ASSET MANAGEMENT



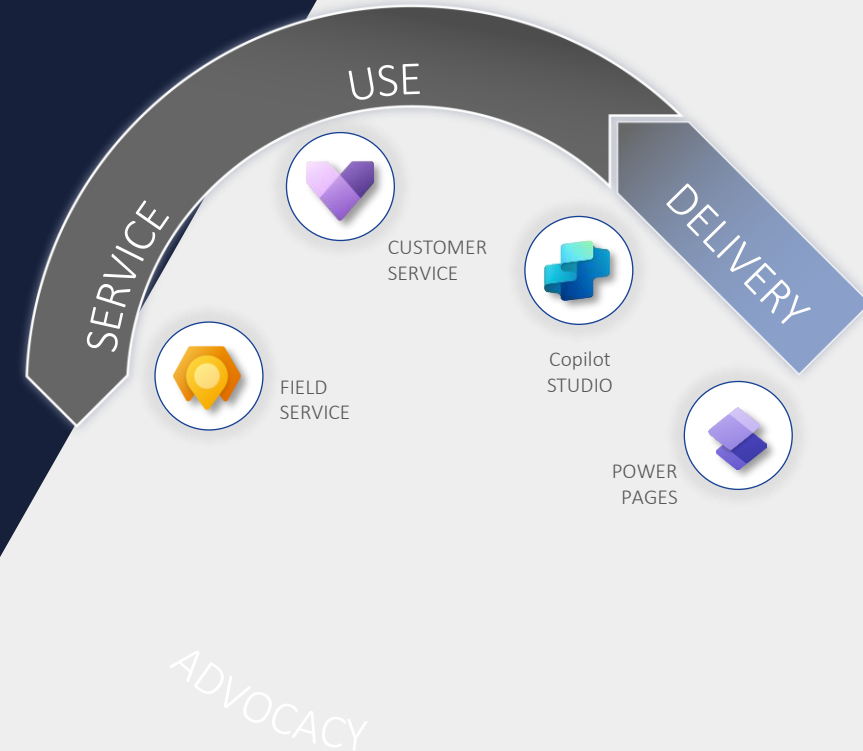
SCHEDULING & TERMINATION



METER REPLACEMENT



BUILDING CONNECTION



CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



Analysis & Reporting



PROBABILITY OF TERMINATION



PROBABILITY OF AN OFFER



CONSUMPTION ANALYSIS



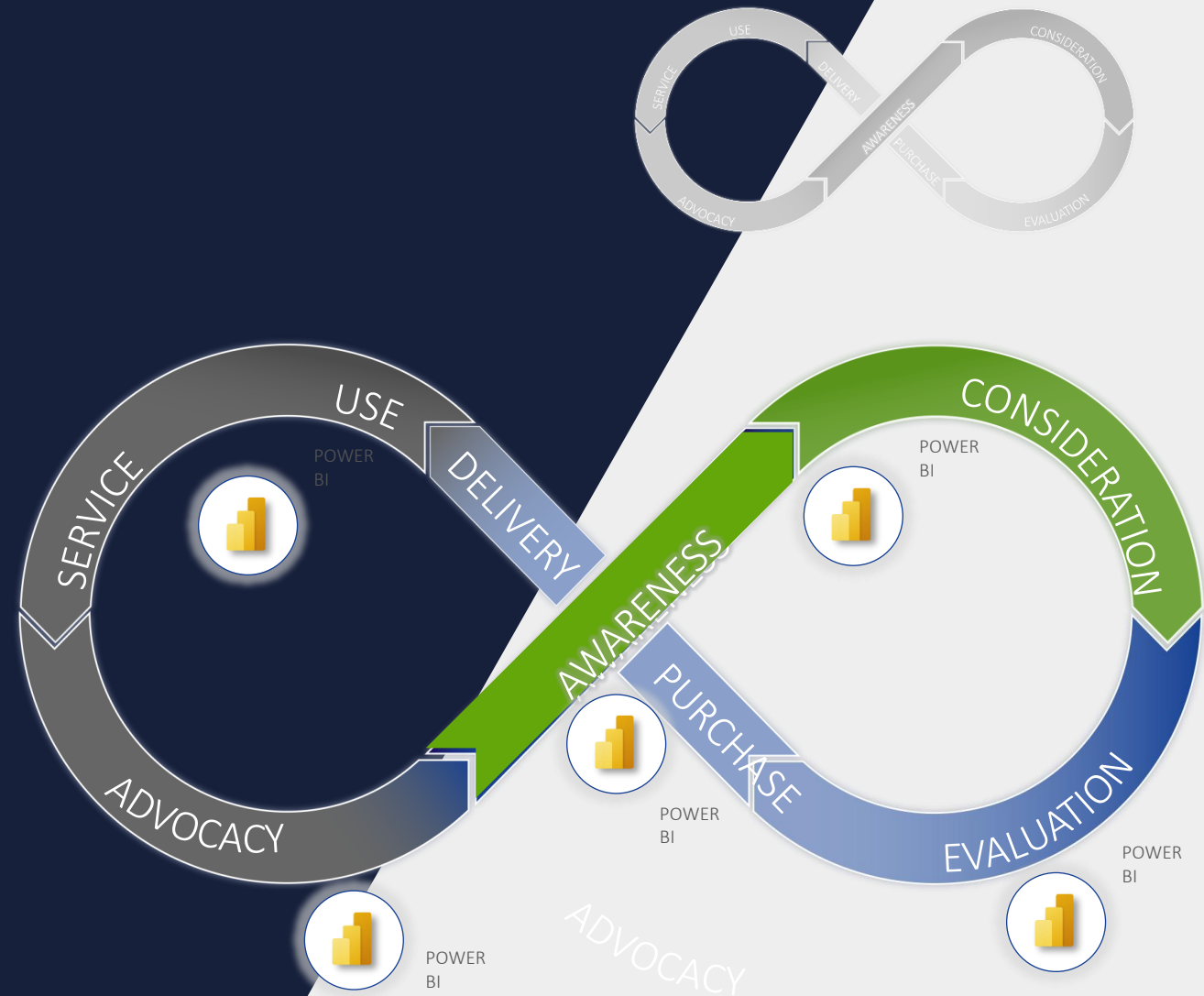
LOAD TEST ANALYSIS



FORECASTING (PROCUREMENT)



KPI DETERMINATION



CUSTOMER LOOP – ORBIS ENERGY & UTILITIES



Billing Integration



MASTER DATA
MANAGEMENT



CONTRACT
MANAGEMENT



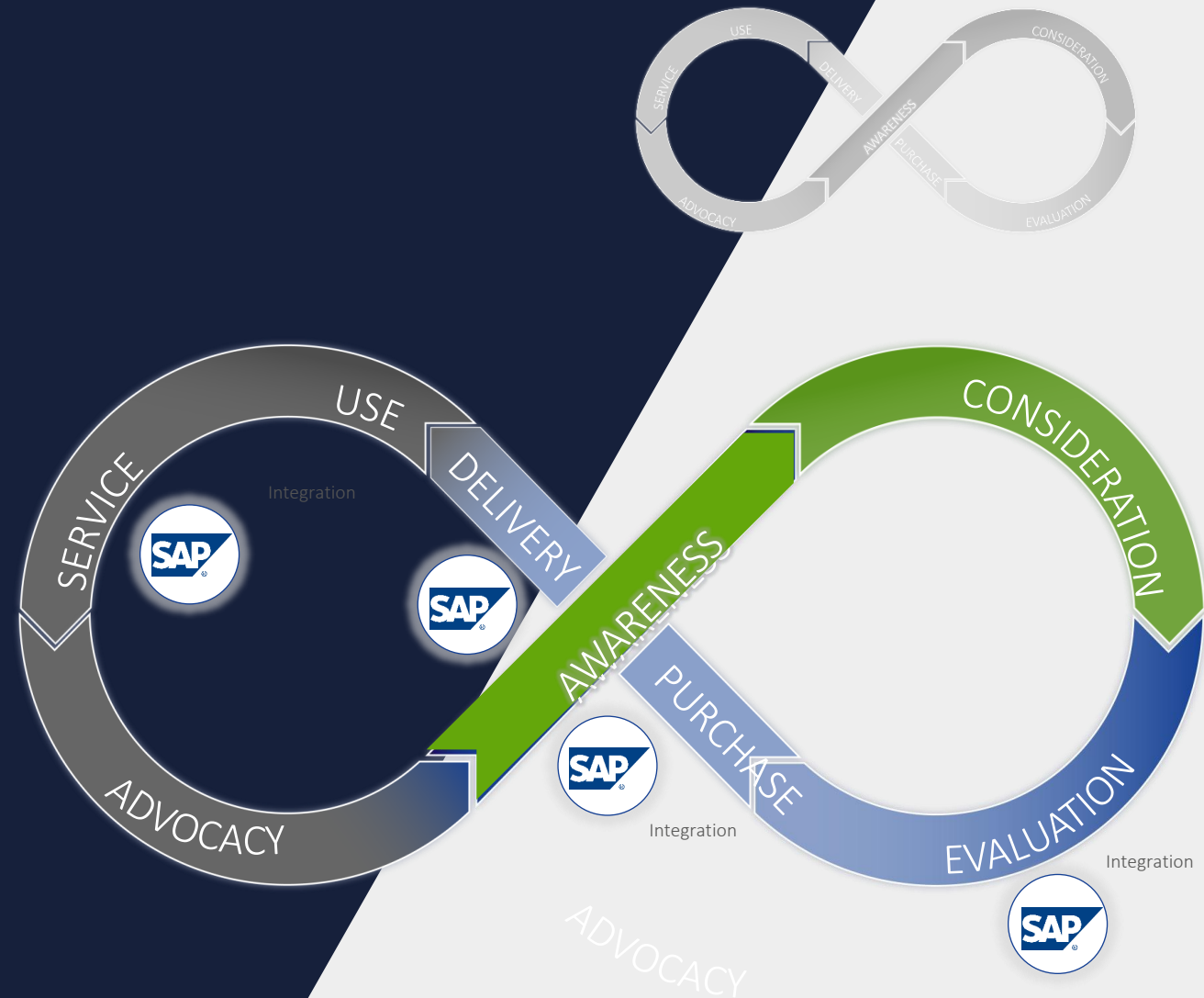
BUSINESS PARTNER
CONSOLIDATION



INTEGRATION OF
SERVICE PROCESSES



MOVING PROCESS
(MOVING OUT, MOVING IN)



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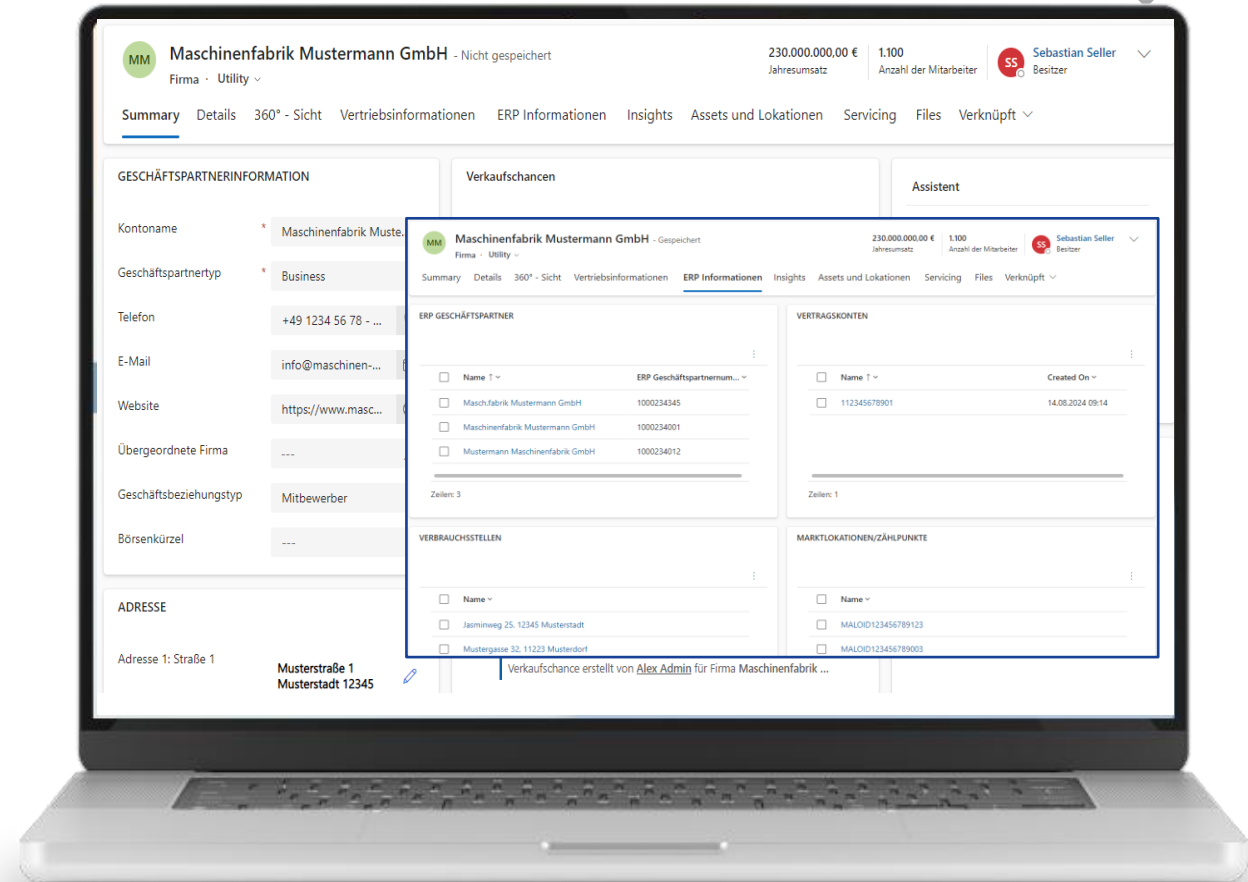
HOW TO START / GET IN TOUCH

CUSTOMER EXPERIENCE

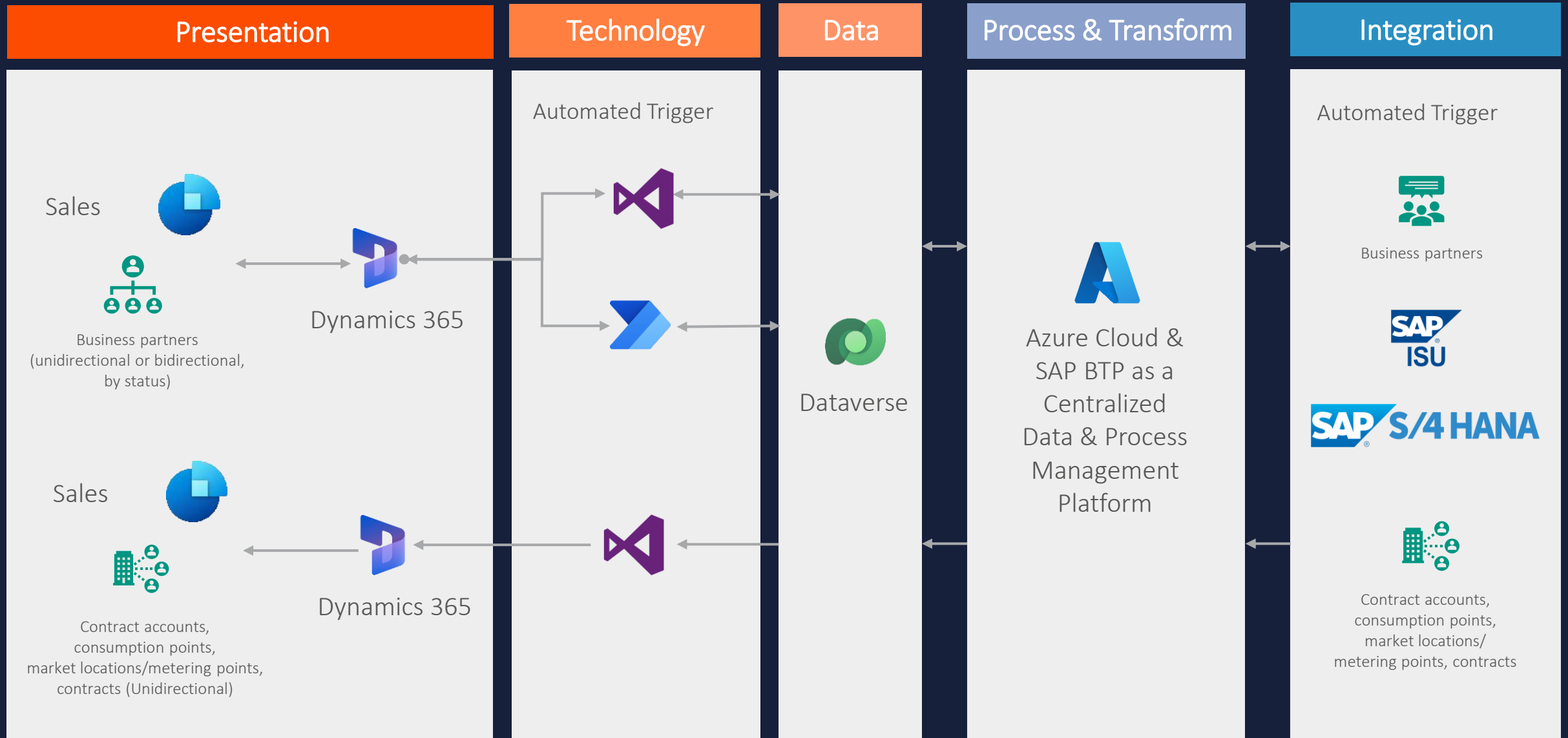


Master Data Integration Business Partner Consolidation

- » Portraying private and corporate customers as business partners.
- » Bidirectional integration of the billing system.
- » Consolidating duplicate customers with multiple business partner numbers from the billing system into a single business partner with a 360° view.
- » Mapping and assignment of master data and object hierarchies, including contract account, service location, market location / metering point, contracts, etc.
- » Managing of the customer lifecycle: prospects, active customers, inactive customers, and former customers.
- » Mapping of business partner roles, such as contracting party, invoice recipient, payer, payee, etc.



TECHNOLOGY MAP - INTEGRATION

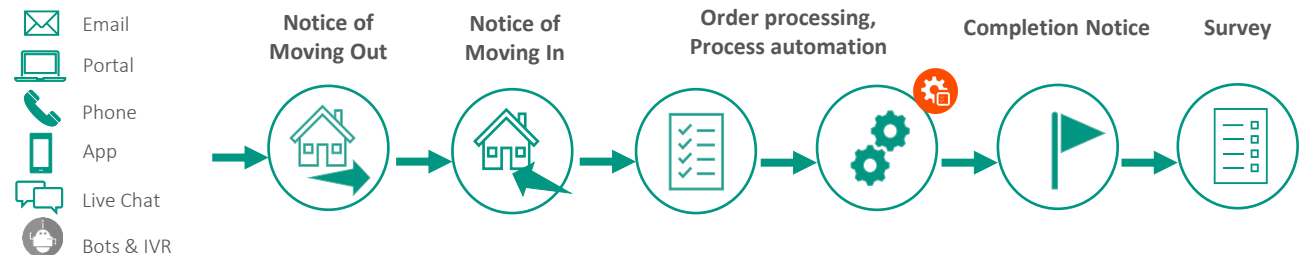
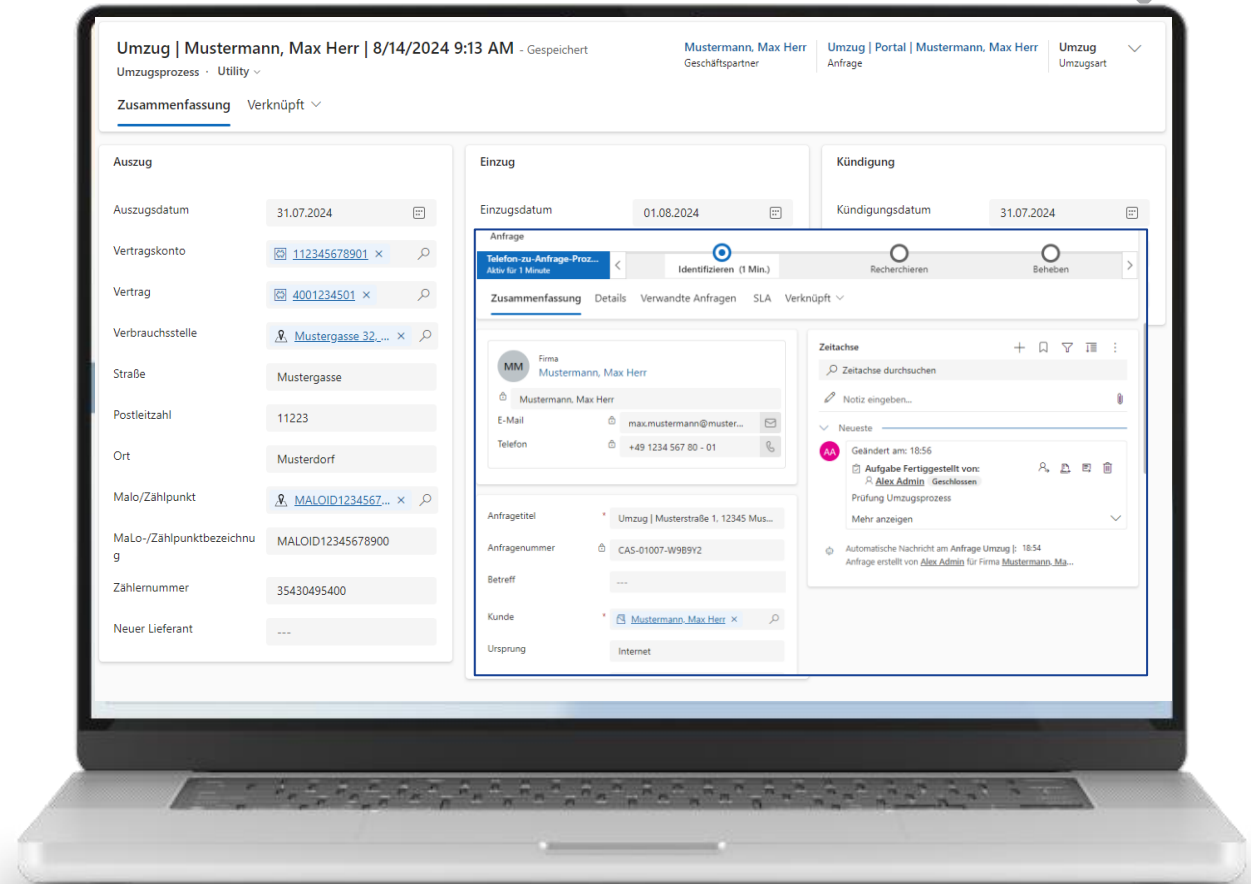


CUSTOMER EXPERIENCE

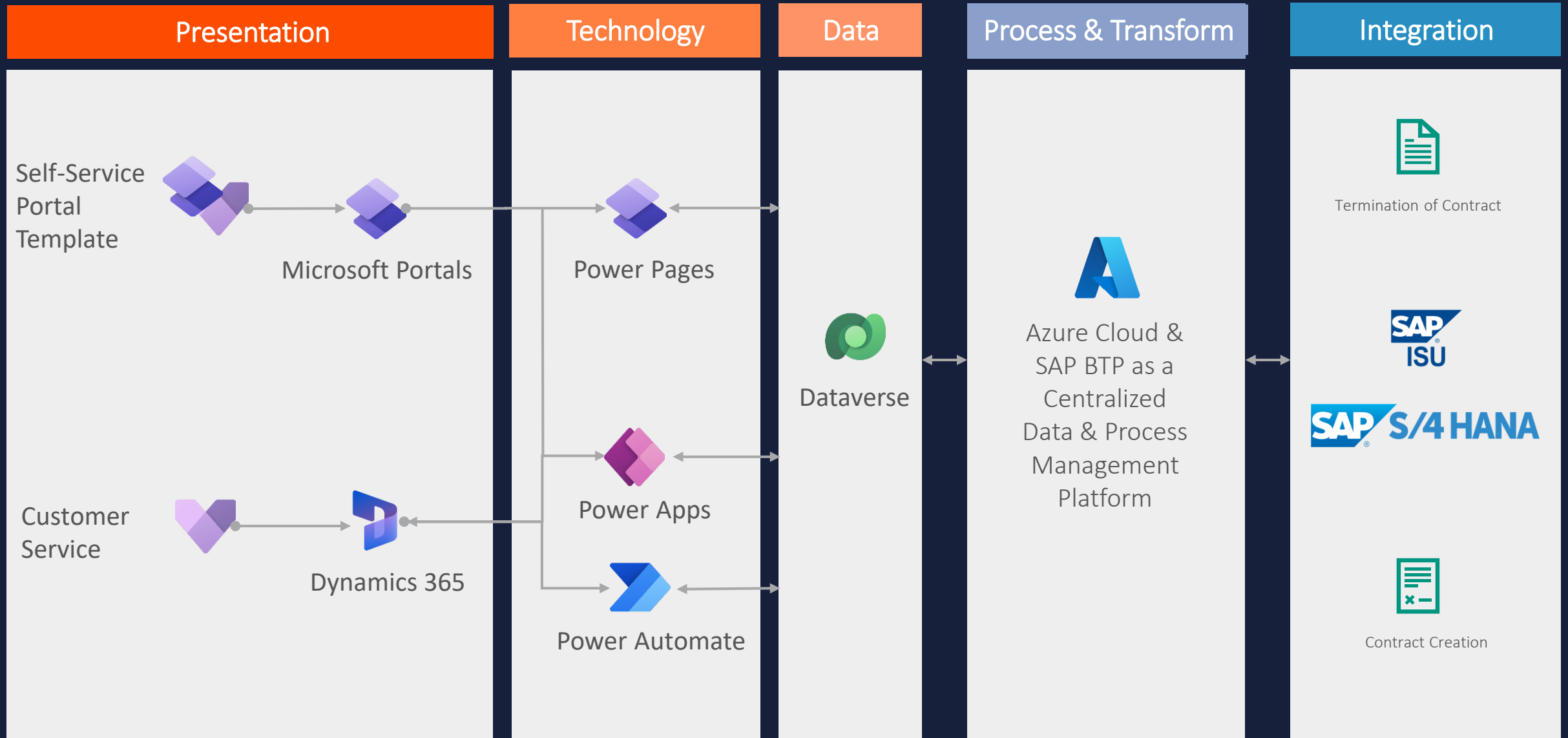


Moving Process

- » Mapping, managing, and tracking the moving process in Dynamics 365 Standard as a service request (case).
- » Change-of-address notifications can be submitted via the self-service portal or through other customer service channels.
- » Display of move-out and move-in notifications, including detailed information on the contract account, consumption point, market location, and meter.
- » Automated processing of contract terminations and contract creation in the billing system.
- » Optional (automated) quote generation when switching plans.
- » Process completion notification.
- » Customer satisfaction survey and customer loyalty initiatives.



TECHNOLOGY MAP – MOVING PROCESS

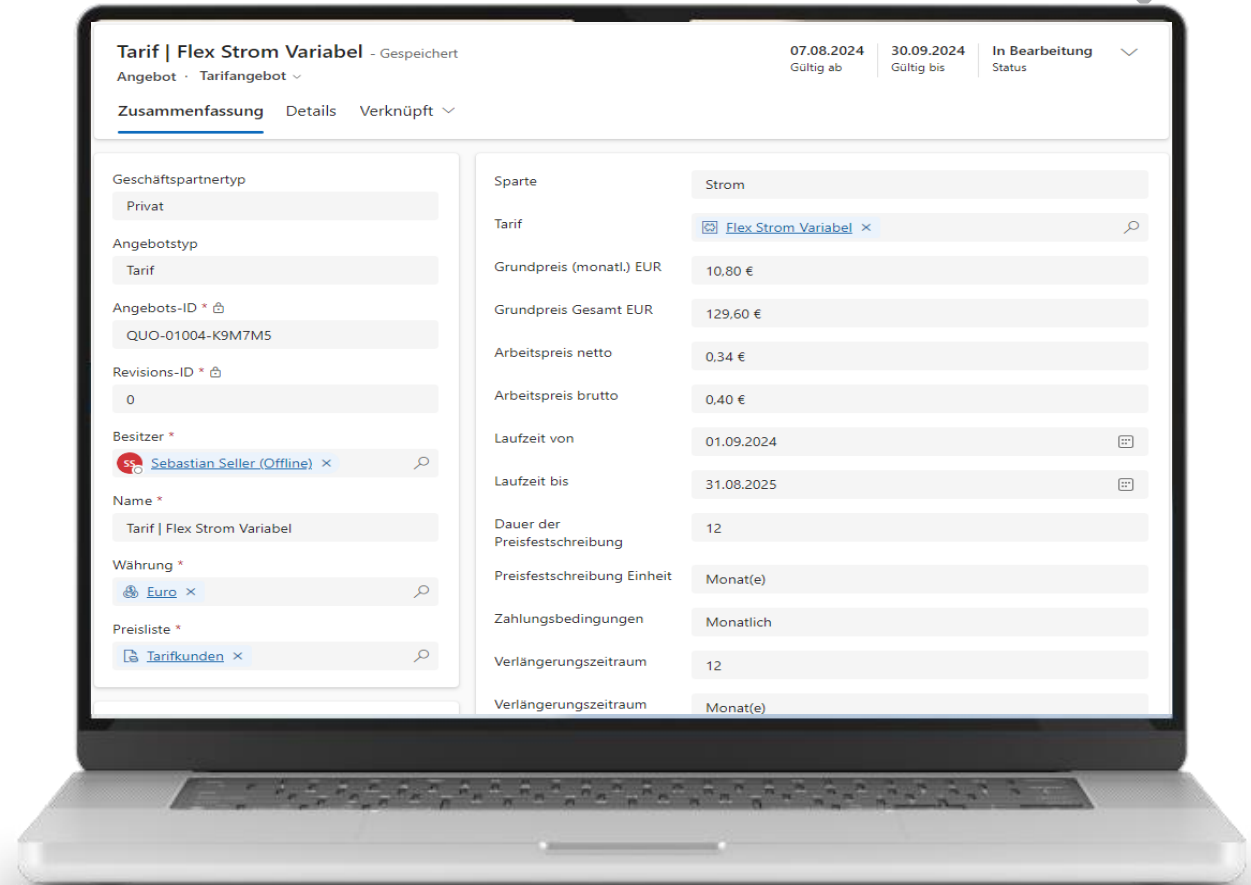


CUSTOMER EXPERIENCE

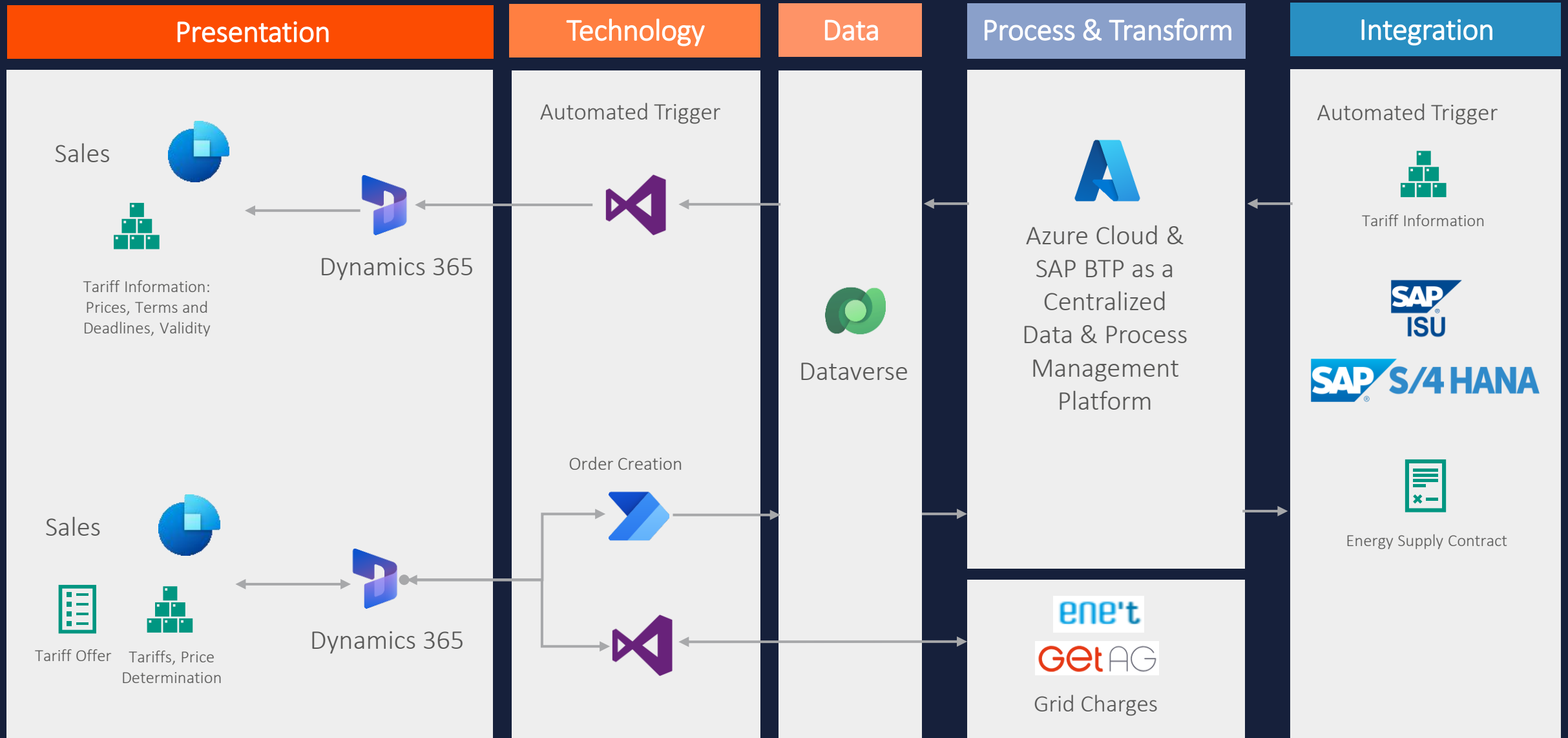


Tariff Offer Process

- » Selection or default assignment of business partners.
- » Existing customer: Identification of consumption point, market location/metering point, or meter number.
- » New customer: Provide the address of the consumption point, including the market location/meter point ID or meter number.
- » Tariff selection, optionally based on annual consumption and desired contract start date, as well as individual preferences.
- » Determination of offer conditions such as energy price, base price, and contract term.
- » Determination of grid charges, e.g. via integration with GET AG.
- » Output of contract conditions such as minimum contract term, automatic renewal, and notice period.
- » Sending of the offer, order creation after offer acceptance, and handover to the billing system.



TECHNOLOGY MAP – PRICING OFFER PROCESS

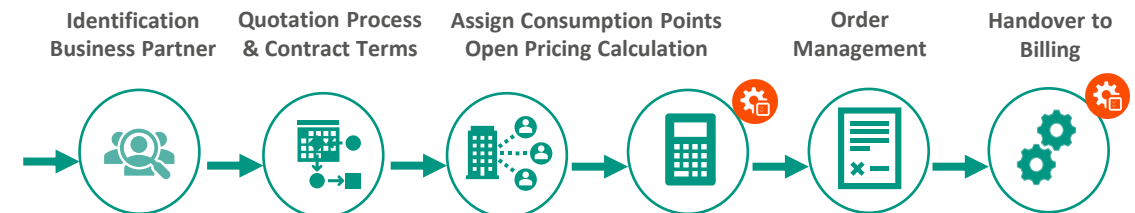
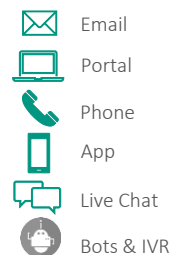
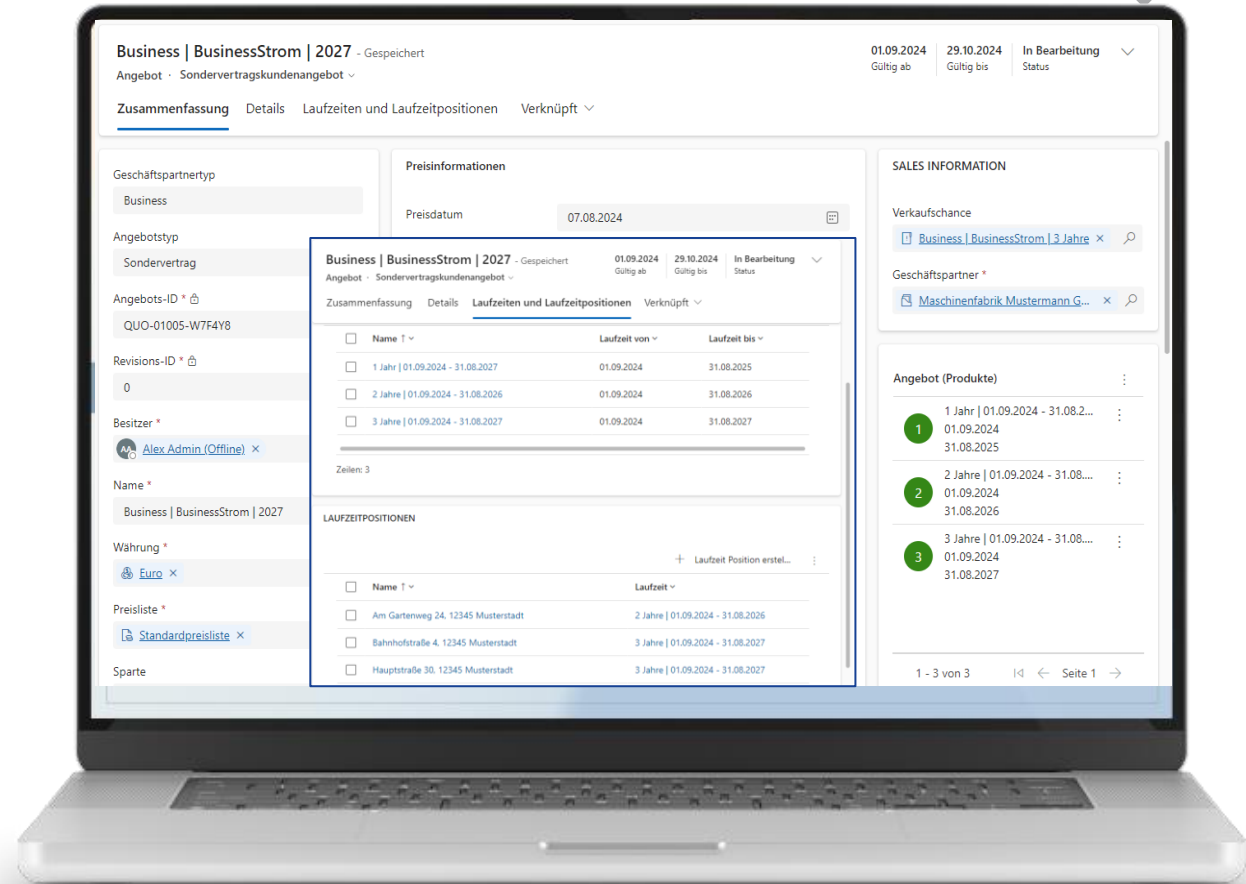


CUSTOMER EXPERIENCE

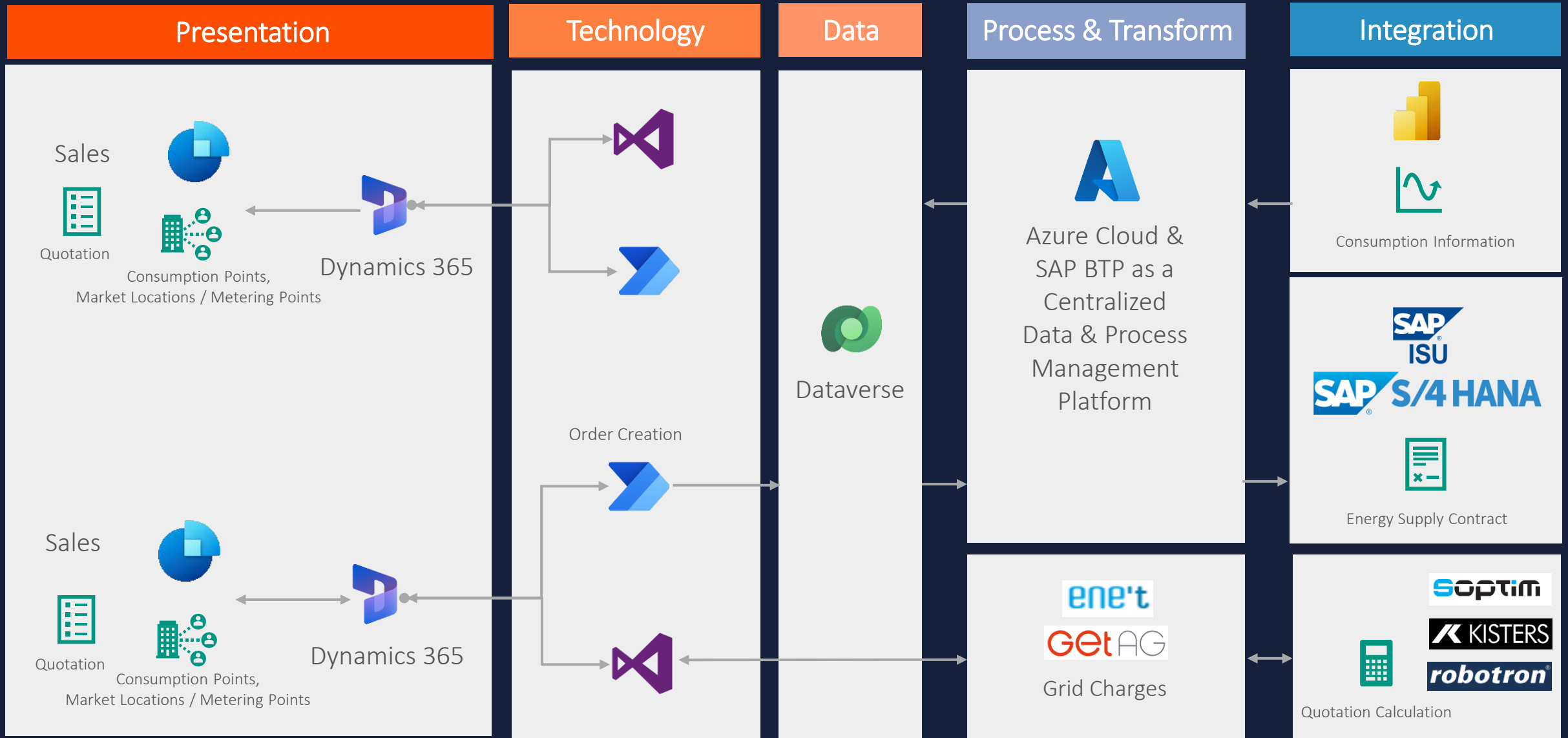


Bidding Process Special Contract Customers

- » Selection or default assignment of business partners.
- » Start of the proposal process and configuration of the proposal.
- » Selection of products and compilation of product-specific information and detailed data to prepare the quotation calculation.
- » Definition of contract terms.
- » Assignment of the consumption points and market locations / metering points to be included in the quotation.
- » Additional capture or import of new consumption point and market location / metering point information not yet available in the system.
- » Integration of the pricing calculation system by transferring of the information required for price and cost calculation.
- » Return of price components for quotation creation.
- » Quotation dispatch, order creation after quotation acceptance, and hand-over to the billing system.



TECHNOLOGY MAP – SONDERVERTRAG

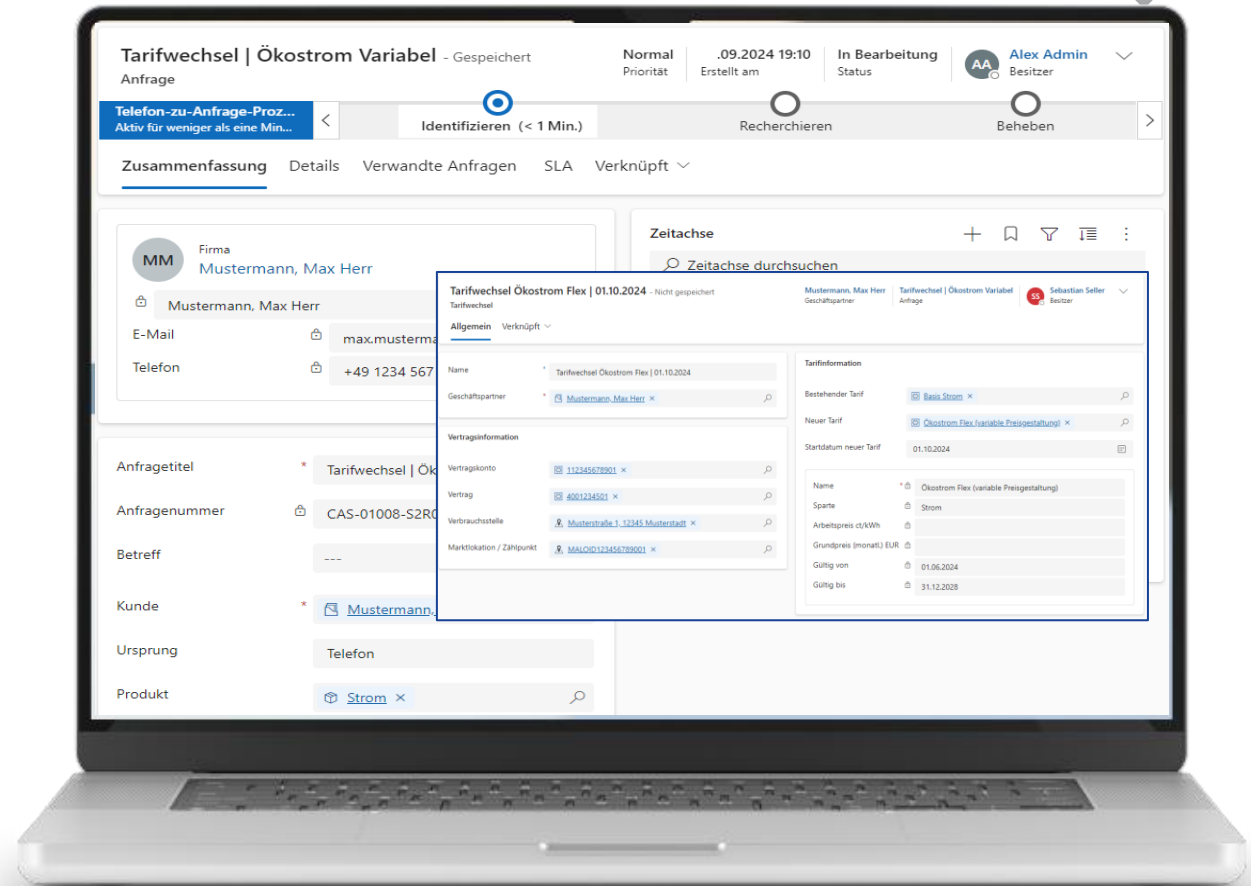


CUSTOMER EXPERIENCE

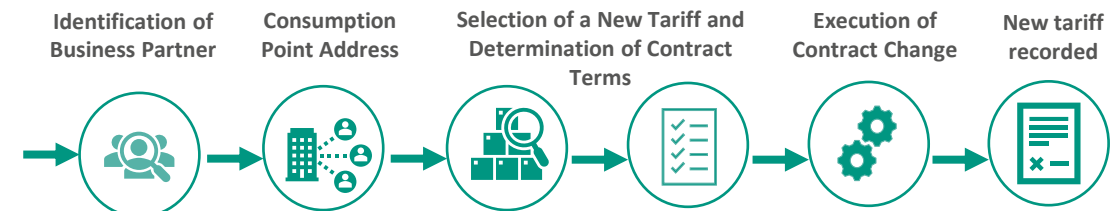


Tariff Change

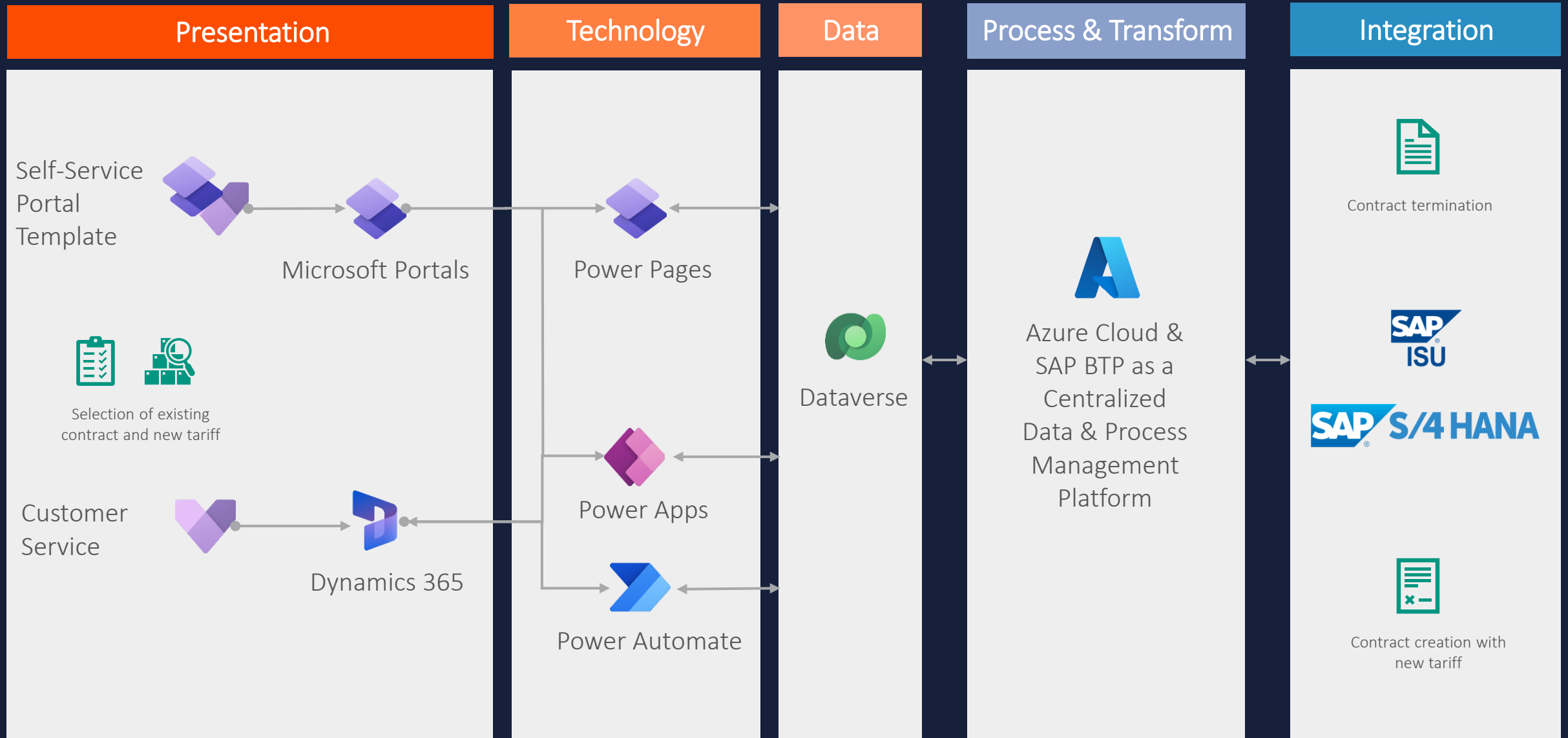
- » Mapping, control, and tracking of tariff changes in standard Dynamics 365 as a service request (case).
- » Request is submitted via the self-service portal or through additional customer service touchpoints.
- » Identification of the business partner with the affected tariff contract.
- » Automated enrichment of detailed information such as contract account, service location, market location, and the current tariff including tariff conditions.
- » Selection of a new tariff, optionally based on annual consumption, desired contract start date, and individual preferences.
- » Determination of new contract conditions such as energy price, base price, contract term, notice periods, etc.
- » Automatic execution of contract termination and contract creation in the billing system.
- » Completion notification upon successful process execution.
- » Customer satisfaction survey and customer retention activities.



- Email
- Portal
- Phone
- App
- Live Chat
- Bots & IVR



TECHNOLOGY MAP - TARIFWECHSEL



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GET IN TOUCH

» You can contact Tobias Krämer directly to discuss your options

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Damien Schirrer, Frank Schmelzer
Chairman of the Supervisory Board: Ulrich Holzer

