



ORBIS MANUFACTURING

Innovating your
Business Processes

1

ORBIS SE – SHORT FACTS

2

OUR MISSION AND YOUR CHALLENGES

3

ARTIFICIAL INTELLIGENCE

4

ORBIS ManufacturingONE DEEP DIVE

5

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.



MANUFACTURING SUCCESS STORIES





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



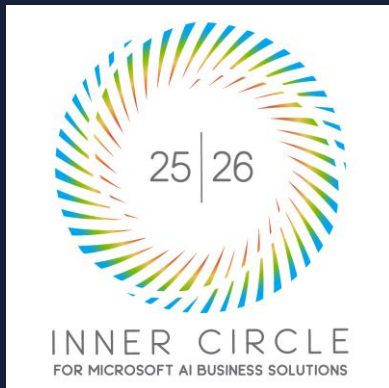
PARTNERSHIP

- 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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OUR MISSION



We empower discrete and process manufacturers as well as machine/plant manufacturers to digitize the end-to-end customer lifecycle on the Microsoft platform – from lead & tender to CPQ/quote-to-order and project/delivery to installed base, service & parts. With D365 Sales, CS & FS, Power Platform, and ORBIS assets (Customer Loop, Spare Parts Finder, AI Assistants), we integrate seamlessly with ERP, PLM, and IoT to deliver fast, measurable, sustainable results.



YOUR CHALLENGES

- » **Digitalization & Automation:** Technological change is driving the need for modernization
- » **Skills Shortage:** There is a lack of qualified workers
- » **Supply Chain Issues:** Global uncertainties are disrupting the supply of materials
- » **Climate Protection & Sustainability:** Pressure to reduce CO₂ emissions and adopt resource-efficient production methods
- » **Economic Situation:** High costs, weak demand, risk of recession



HOW WE CAN HELP YOU



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



PREDEFINED PRODUCTS AND SOLUTION TEMPLATES



INDUSTRY-SPECIFIC PROCESSES WITH MICROSOFT DYNAMICS 365 FOR MARKETING, SALES, AND SERVICE



INTEGRATION OF AI SUPPORT & AGENTS




STANDARD INTEGRATIONS

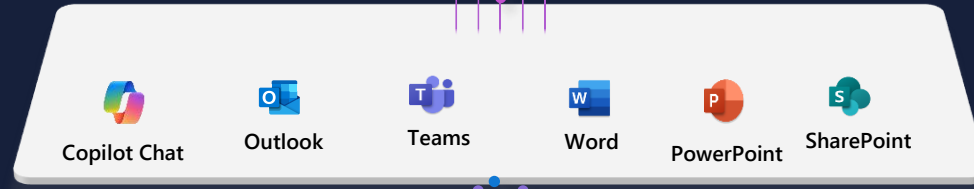


AS A MICROSOFT INNER CIRCLE MEMBER & FAST TRACK PARTNER WE PROVIDE MAXIMUM SUPPORT

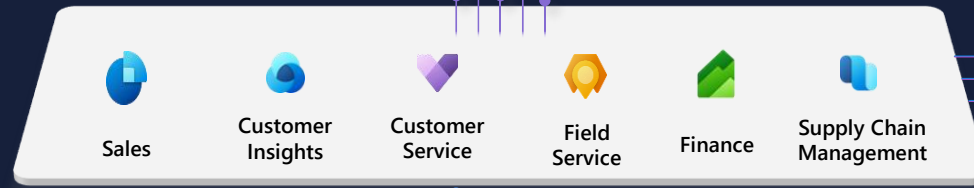
MICROSOFT ECOSYSTEM



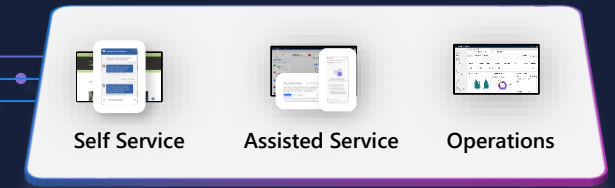
 **Modern Work**
UI for AI



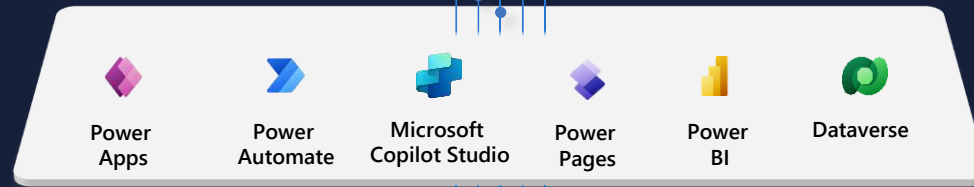
 **Dynamics 365**
Unified CRM & ERP



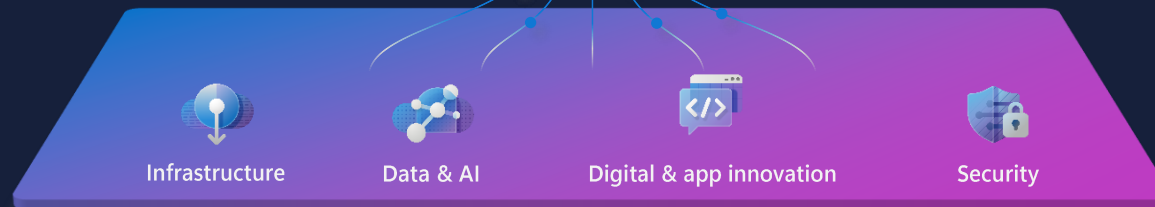
Microsoft Digital Contact Center Platform



 **Power Platform**
Low Code > Pro Code



 **Azure**
Microsoft Cloud



1

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2

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4

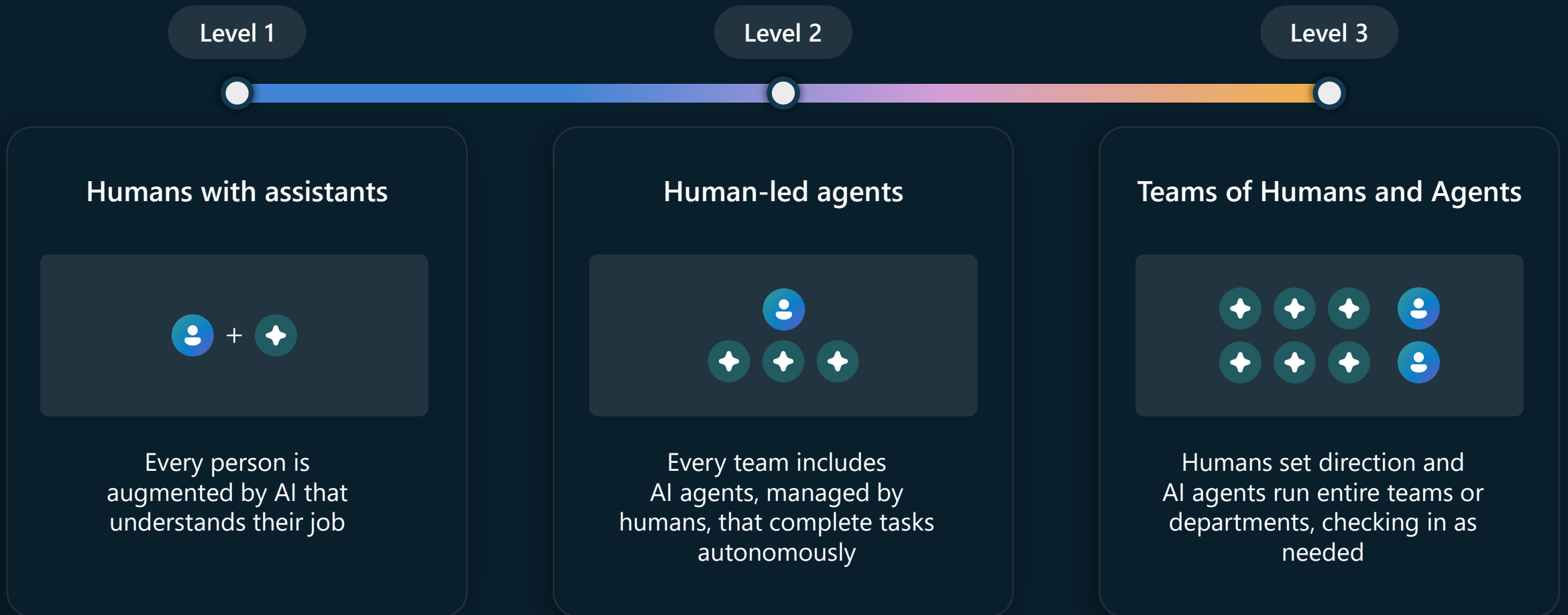
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HOW TO START / GET IN TOUCH

ARTIFICIAL INTELLIGENCE

Levels of AI transformation



ARTIFICIAL INTELLIGENCE



ARTIFICIAL INTELLIGENCE



Design of AI agents into existing processes

ARTIFICIAL INTELLIGENCE



Design of humans-in-the-loop into AI-centric processes

ARTIFICIAL INTELLIGENCE



ManufacturingONE includes these AI solutions:

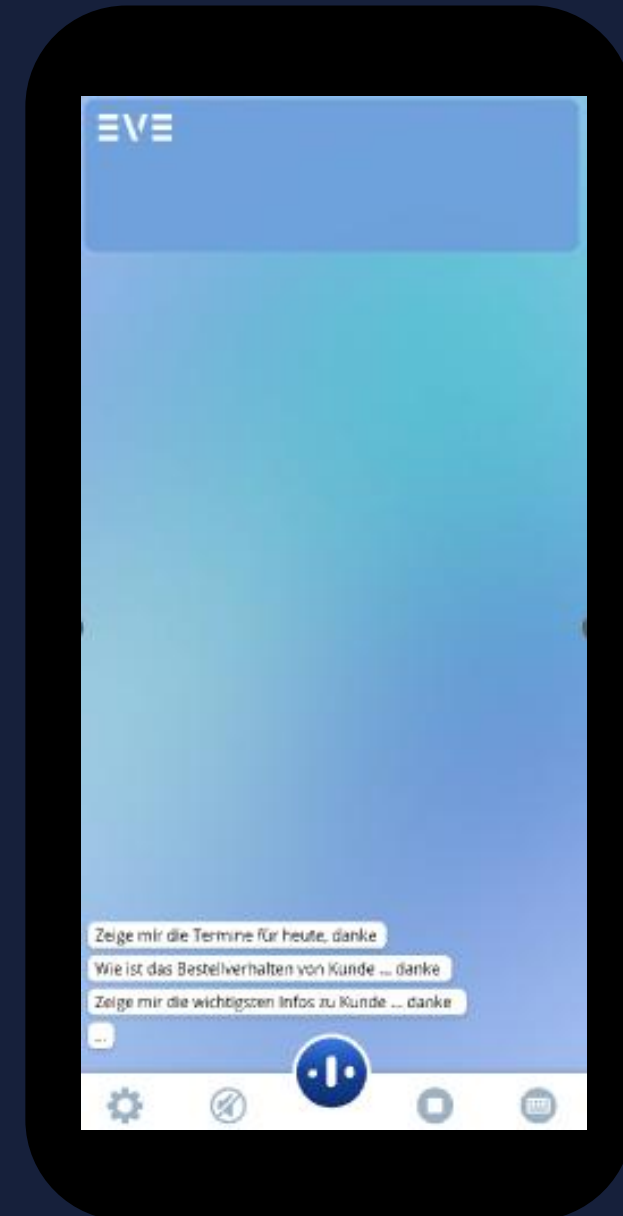
- » EVE Digital Sales Assistant
- » EVE Visit Report Agent
- » EASY MAIL





DIGITAL SALES ASSISTANT

- » AI-powered sales assistant designed to boost productivity and support sales representatives in their daily work
- » Work without sitting in front of a computer—voice control with voice feedback
- » Create a visit report and receive a list of tasks that are automatically synced with the responsible person
- » Get an overview of your customer with a single click
- » ERP and Dynamics 365 data can be accessed and modified





DIGITAL SALES ASSISTANT



Connected to your Microsoft Dynamics Sales and Dataverse



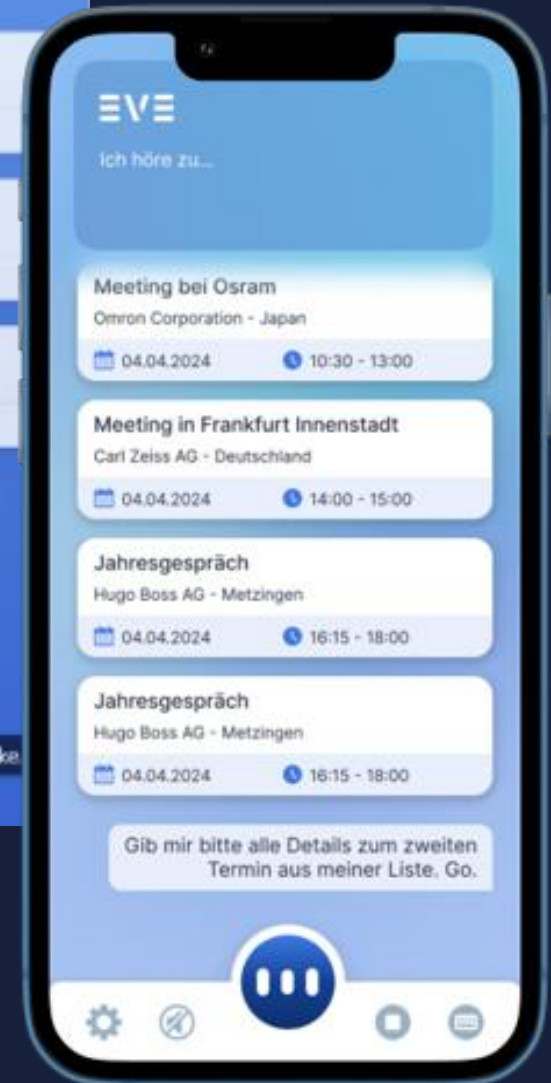
Integrated with the Power Platform



Boosted with AI Capabilities from Azure



I can find related ERP Data





Problem

Keeping track of client appointments and writing a report after a meeting is time-consuming and requires sitting in front of a computer.

What kind of meetings do I have today?
I need to create tasks for myself and others based on my meetings.

Solution

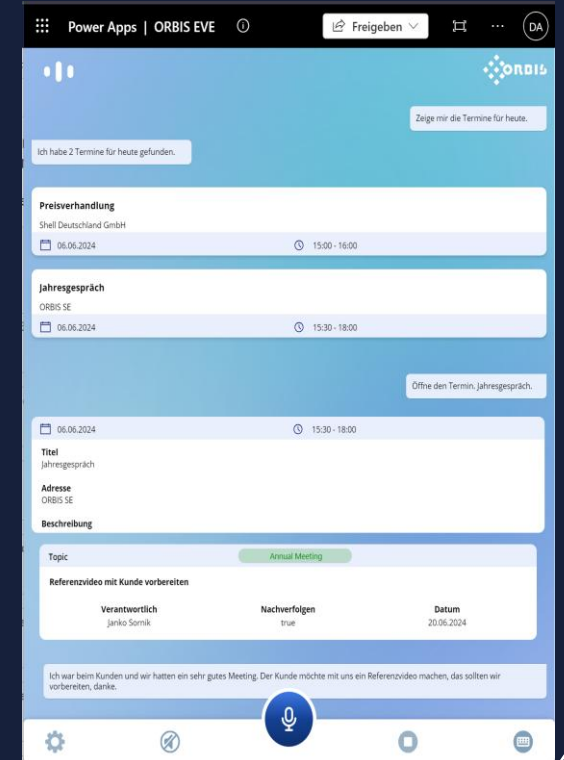
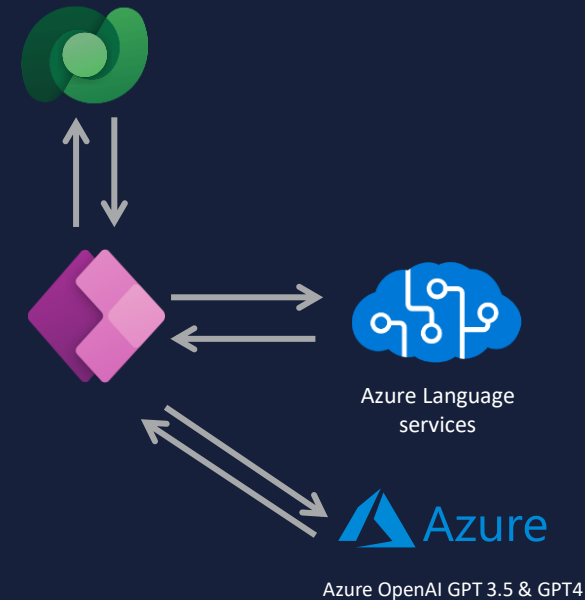
A mobile app that tracks my meetings and converts my spoken words into text and tasks, even while I'm driving or walking.

Thank you very much for your summary. Here is your report and the tasks I was able to identify:

- 1...
- 2...

Result

Using Power Apps with Azure OpenAI and Azure Language Services with data from Dynamics 365 (Dataverse)





VISIT REPORT AGENT

Current Process

Client meeting



Recording of notes in the CRM



10 Minutes

Creating follow-up assignments



5 Minutes

Doing follow-up



New Process with EVE

Client meeting



Recording of notes in the CRM



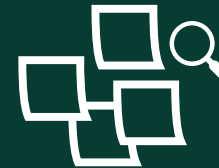
4 Minutes

Creating follow-up assignments



0 Minutes

Doing follow-up





ROI: 135%

€114K

Total Investment

Implementation & licensing costs 3 Years

€89K

Annual Value

Savings

1Year

Payback Period



BENEFITS



More information about visits is being collected



Automated framework for standardizing visit reports



An internal knowledge base is being developed



Erhöhte Produktivität im Vertrieb



Future support for the next appointment based on the information provided



Greater user acceptance, including increased CRM usage



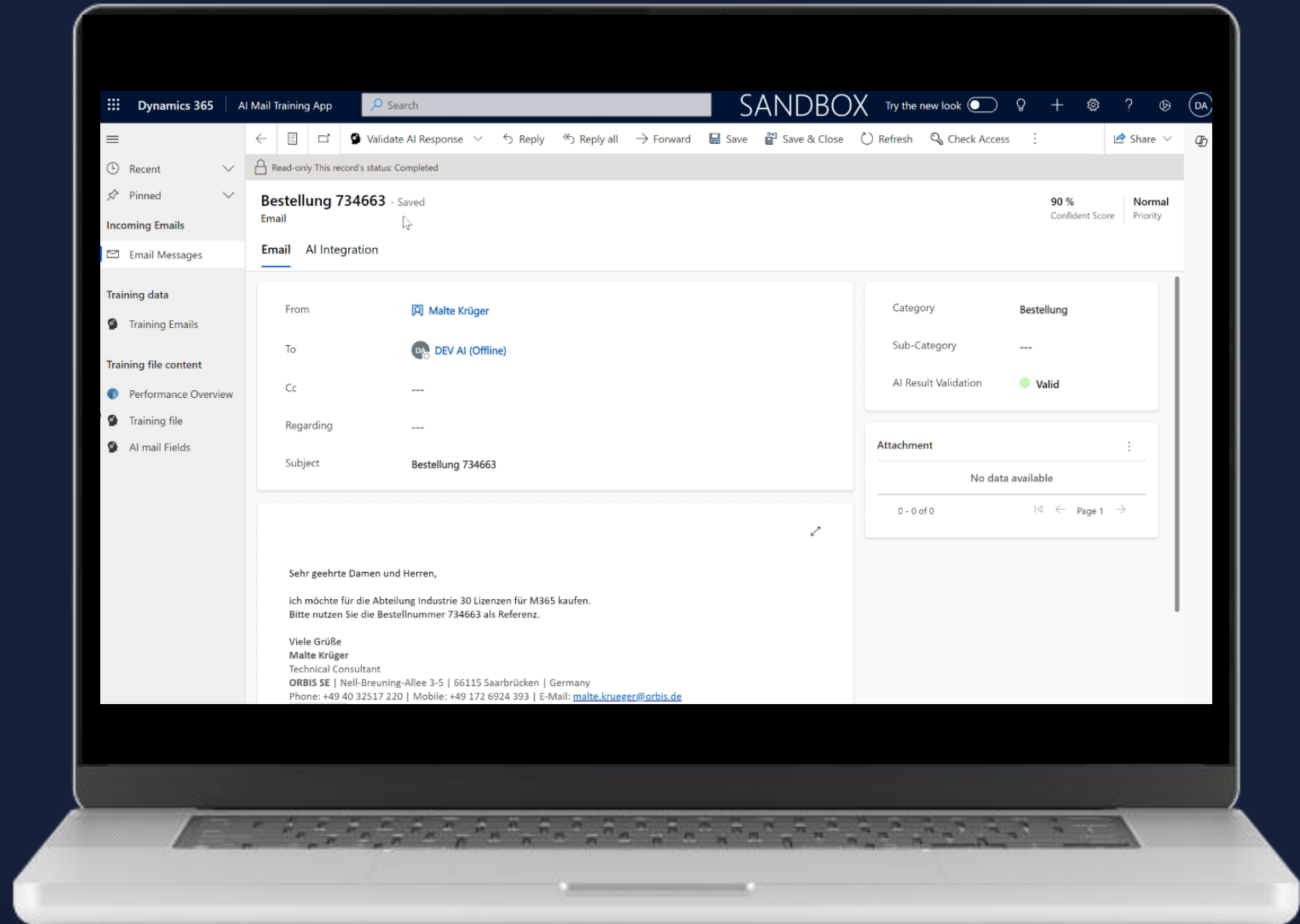
Additional agents can be connected in the future (email dispatch, handling of complaint processes, etc.)

Challenge:

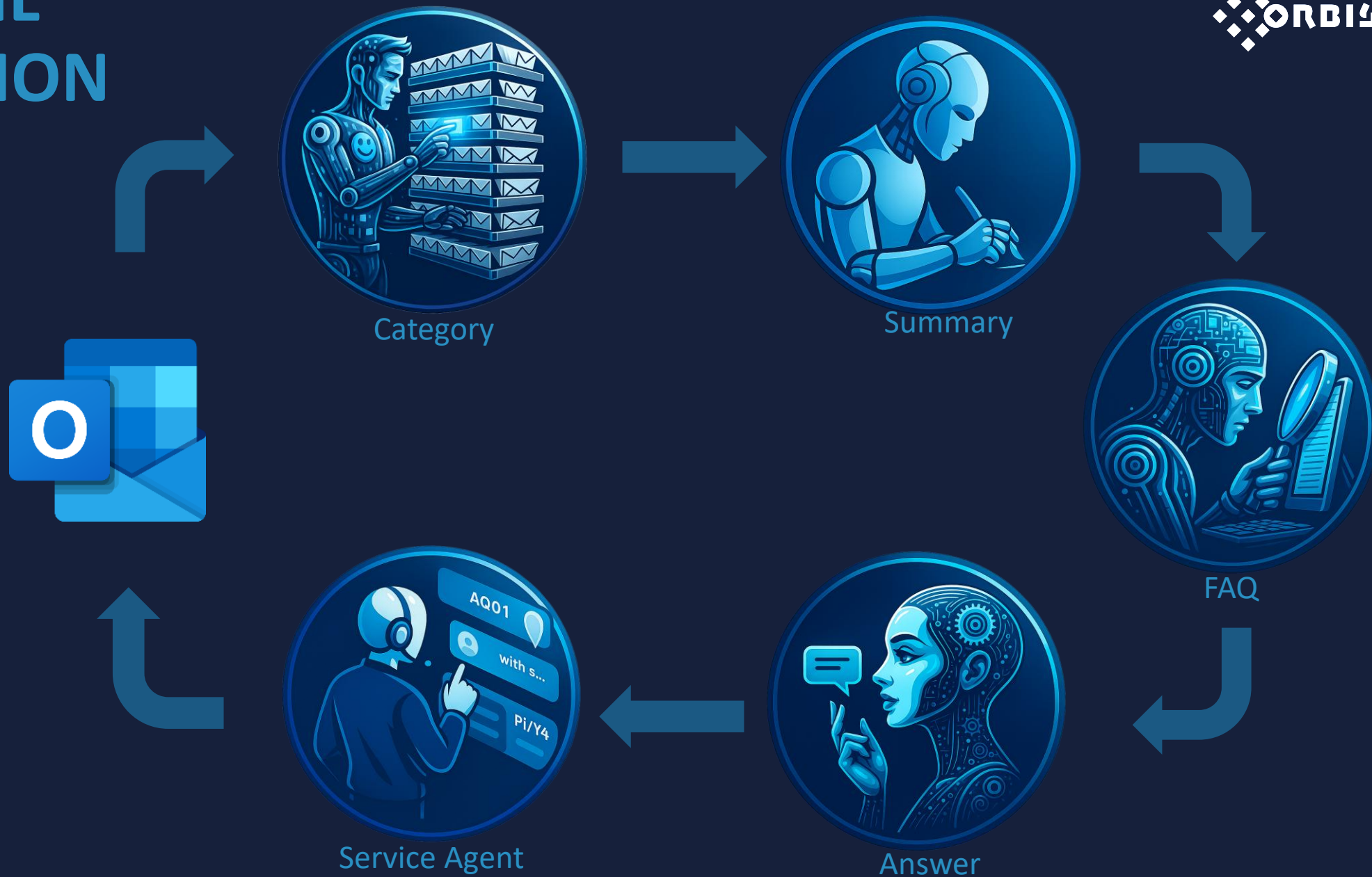
We receive a lot of emails and need to forward them to the right people within the company. In many cases, the topics are recurring, and we need to provide the customer with a response.

Solution:

We extract the content of emails and use AI to identify the relevant subject. The email is then forwarded to the appropriate person. In addition, email content can be extracted and stored in the data model. If necessary, attachments (e.g., PDFs) can also be processed and workflows triggered automatically.



EASY MAIL AI SOLUTION



Category

Summary

FAQ

Service Agent

Answer

ROI: 222%

€63K

Total Investment

Implementation & licensing costs 3 Years

€67K

Annual Value

Savings

1Year

Payback Period

EASY MAIL ADVANTAGES



Increased efficiency and speed—
information reaches the right people



Increased customer satisfaction through
prompt processing



Scalability as email volume increases



Can be integrated into existing solutions



Reduced workload at the first level



Results improved through AI training

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5

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MANUFACTURING – USE CASE OVERVIEW

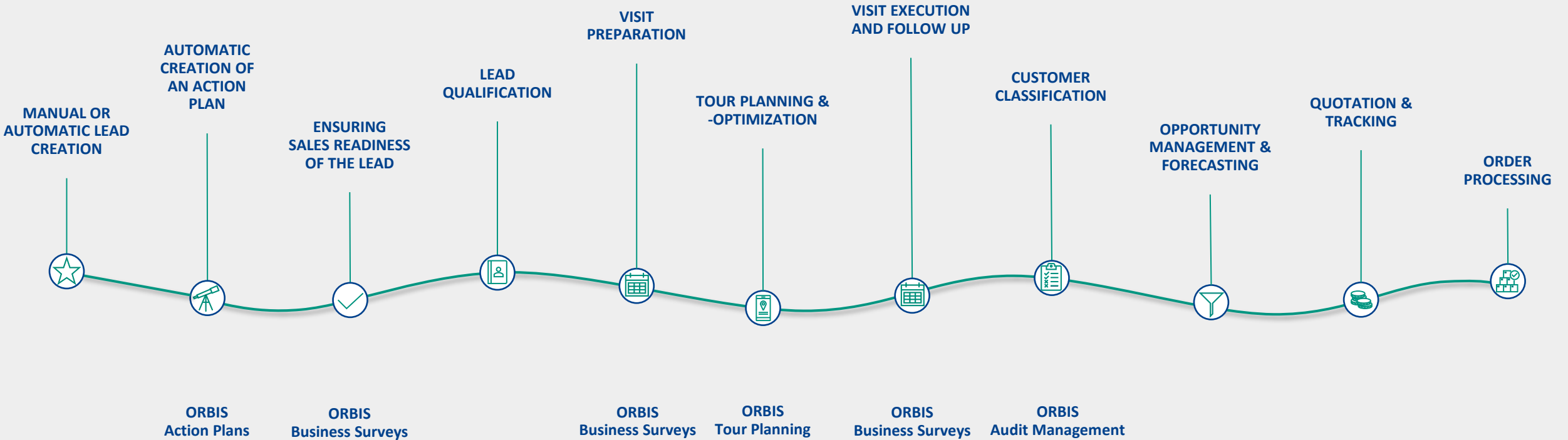


SALES EXCELLENCE

Optimizing Sales Processes for
Sustainable Growth

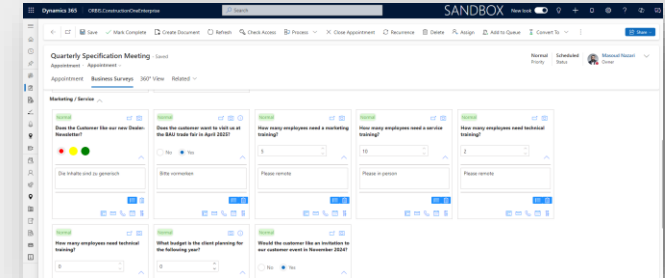
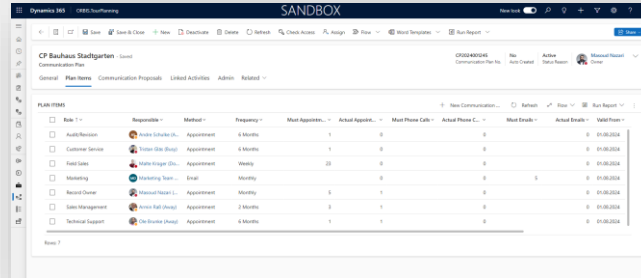
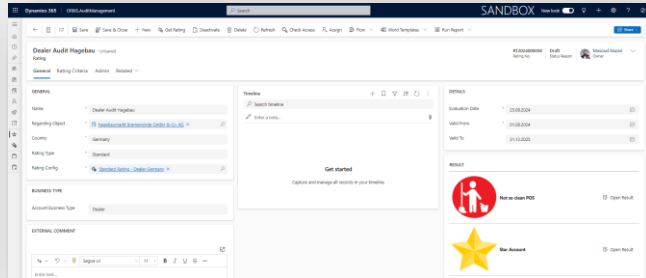


EXAMPLE LEAD 2 CASH PROCESS



CONNECTED | EFFICIENT | TRANSPARENT

SALES EXCELLENCE



MULTIDIMENSIONAL CLASSIFICATION

- **Comprehensive Segmentation:** Classify customers based on quantitative (e.g., revenue) and qualitative criteria (e.g., loyalty).
- **Priority-based ranking:** Focus on customer potential and competitive position to allocate resources effectively.

STRATEGIC ACTION PLAN

- **Clear Goals & Actions:** Targeted strategies and activities to develop the customer base, increase revenue, and improve customer satisfaction.
- **Structure & Performance Measurement:** A defined timeline, clear responsibilities, and measurable criteria for evaluating success.

STRATEGIC COMMUNICATION PLAN

- **Targeted communication:** Establish communication frequencies based on customer segment (A1, B2, C3, etc.).
- **Clear roles & channels:** Define responsibilities and use appropriate channels (in person, by phone, online) for each segment.

OPTIMIZED ROUTE PLANNING

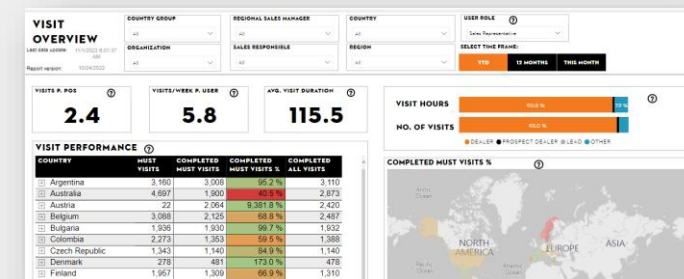
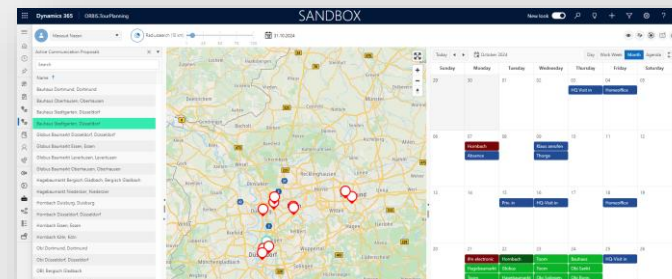
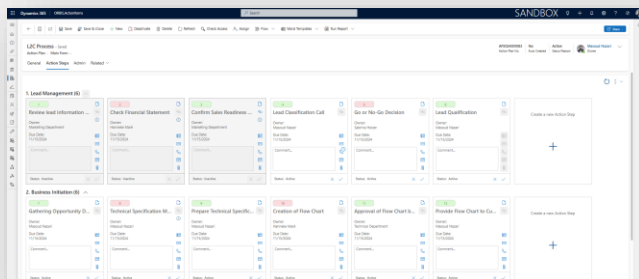
- **Data-driven routing:** Route planning based on calculated recommendations for efficient travel.
- **Prioritized visit management:** Visit suggestions based on customer relevance and proximity, supported by a map view.

STRUCTURED VISIT MANAGEMENT

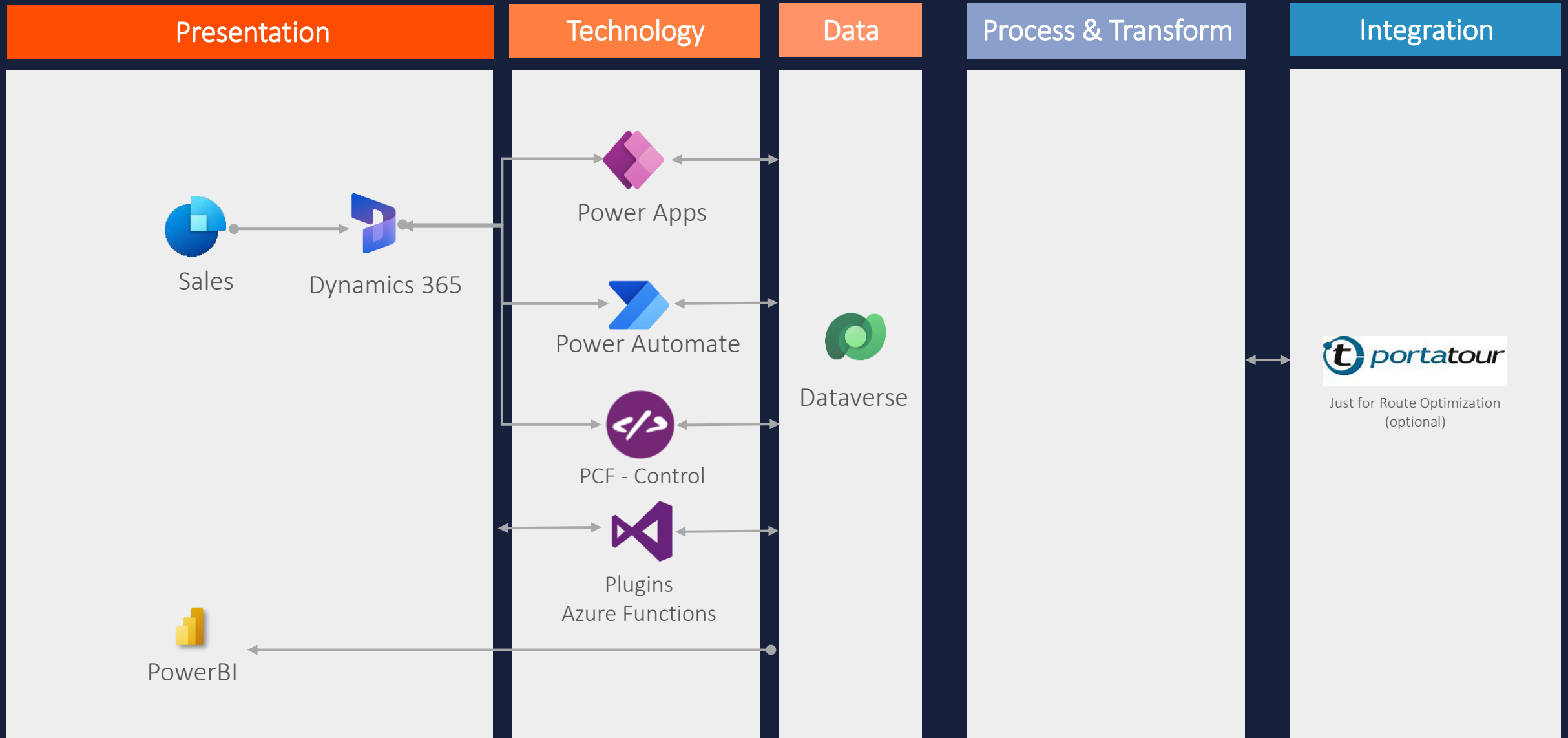
- **Data & KPI Analysis:** Collect key data to optimize customer support.
- **Structured topics:** Provide discussion prompts for campaigns, opportunities, and issues.

COMPREHENSIVE REPORTING

- **Integrated Insights:** Consolidate data from all customer interactions.
- **Performance Tracking:** Use KPIs to make strategic decisions and set customer priorities.



TECHNOLOGY MAP – SALES EXCELLENCE



GEOGRAPHICAL LOCATION (LOCATION MAP)



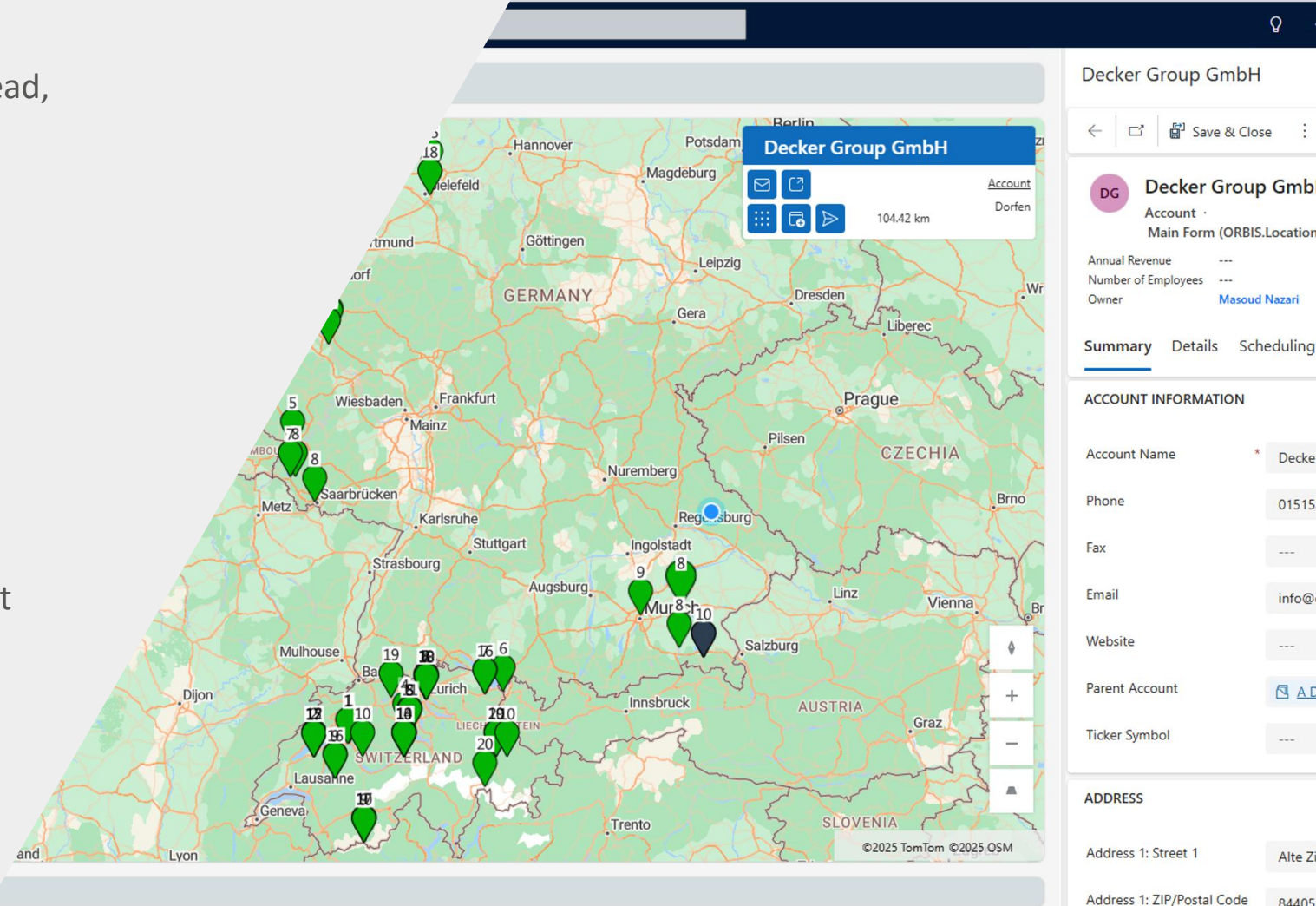
BRIDGE THE GAP BETWEEN DATA AND ACTION

Your data—now right where it's needed: on the map

- Where is everything located? (Company, Contact, Lead, Opportunity, Property, ...)
- What's nearby?
- How is the area divided up?
- Where does untapped potential lie?
- How many assets are assigned?

The map is more than just a visualization—it's your cockpit for action.

- Open, edit, and act on records directly
- Create activities—contextually accurate and efficient
- Flexible filters, color schemes, and pin designs
- Radius search for targeted planning
- Google Maps integration for seamless navigation
- Fully scalable—extendable to all CRM tables
- Mobile access



TECHNOLOGY MAP – LOCATION MAP

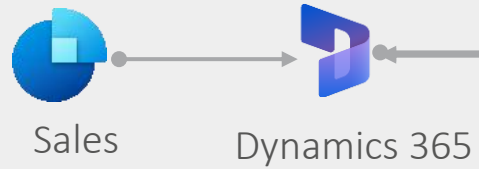
Präsentation

Technology

Data

Process & Transform

Integration



Power Apps

Power Automate

PCF - Control

Plugins

Dataverse

SMART REMINDERS

IMPULSES AT THE RIGHT TIME



Business Value – What You Really Gain

- » Improved adherence to deadlines and tracking of important tasks
- » Higher completion rates through timely reminders
- » Reduced workload for employees through automated processes
- » Improved customer relationships through proactive communication
- » Consistent and structured reminder processes
- » Greater transparency and control over follow-up activities

Technical strengths – flexible, precise, scalable

- » Internal reminders via email, push notifications, or in-app notifications
- » External reminders via email to your customer
- » Customized text based on country, table, and context
- » Easily configurable templates and rules
- » Automated, time- and event-driven delivery
- » Scalable and flexible – no development effort required

The screenshot displays a CRM interface. On the right, a 'Quick Create: Reminder' form is open, showing fields for Reminder Type (Standard Reminder), Reminder Date (5/8/2024, 8:00 AM), Regarding (Allianz Arena Charging Sta...), Owner (Masoud Nazari), Description, Notification Type (Email, Flow App Push Notification, In-App...), Reminder Recipient (Record Owner), Reminder Recipient (CC) (Contact), Contact (CC) (Clark Rogers), Notification Subject (Quote Reminder), and Notification Body (Hello, The validity of the offer will expire in 10 days. Best regards, Your CRM Team). On the left, a data table is visible with columns for Unit, Quantity, Discount, and Extended Amount. The table contains several rows of data, including values like €5,480.00, 5.00000, ---, €27,400.00, and a total of €237,050.00.



Segmentation

- Scoring
- KPI

The screenshot displays a CRM interface for a customer named 'Alice and the Rabbit Hole and the Rabbit Hole, 79853 Lenzkirch'. The interface is divided into several sections:

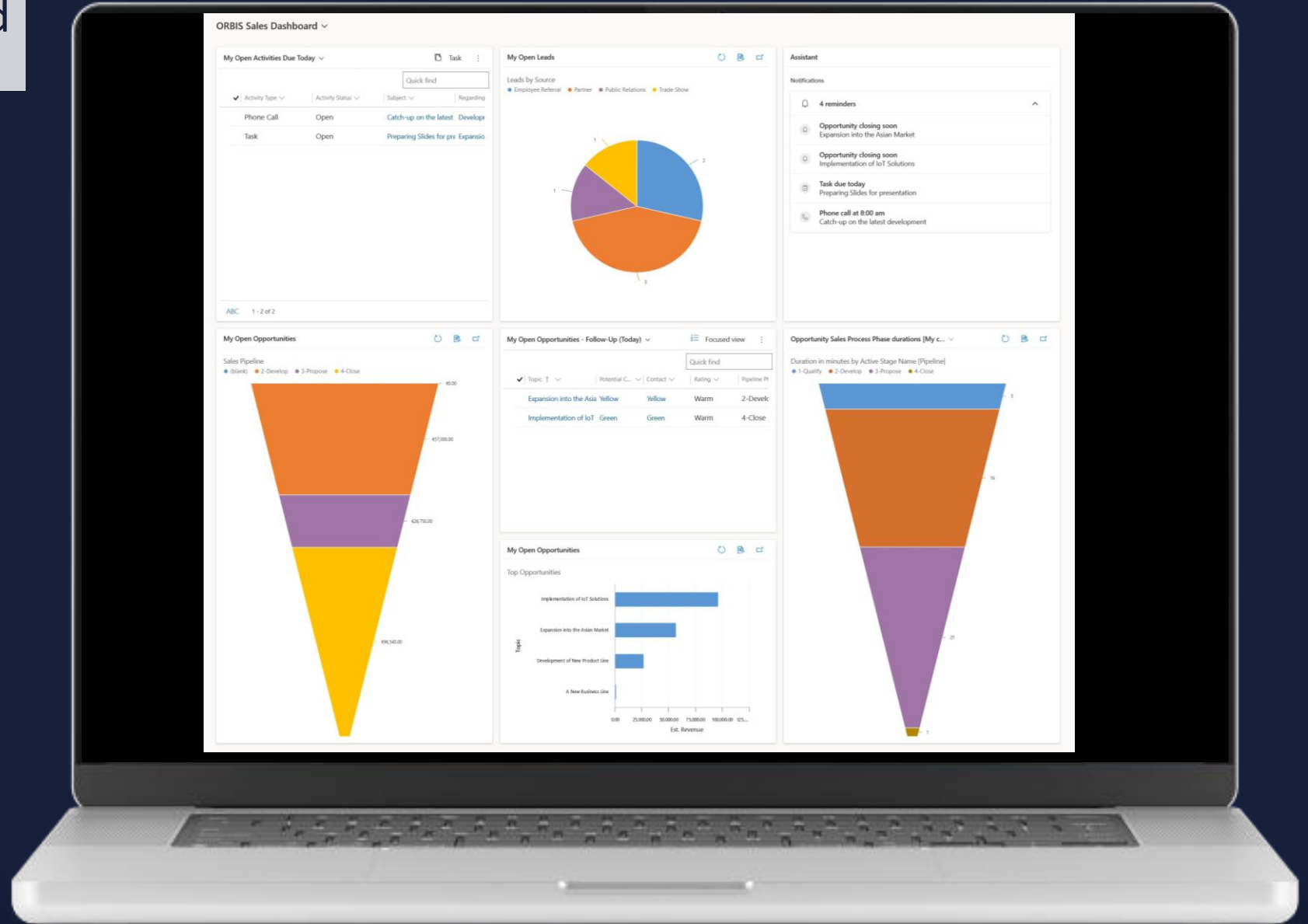
- Header:** Shows the company name, classification 'C3', and owner 'Kathrin Grimm'.
- Navigation:** Includes tabs for 'Zusammenfassung', 'Adresse und Karte', 'Contacts', 'Details', 'Klassifizierung' (active), 'Verkaufsdaten', 'Marketing', 'Beziehungen', 'Verwaltung', and 'Verknüpft'.
- Segmentation Matrix:** A 3x3 grid with columns labeled 'C1', 'B1', 'A1' and rows labeled 'C2', 'B2', 'A2' on the left, and 'C3', 'B3', 'A3' on the right. The 'C3' cell is highlighted in red.
- Market Potential (General):** A table with a total score of 55 / 250.

Metric	Value	Score
Abgleich des Produktportfolios		15
Dauer der Geschäftsbeziehung	3-5	10
Beziehungsqualität		0
Durchschnittliches Bestellvolumen	58888	25
Erreichte Auftragskontinuität II	> 12 Monate	0
Erzielter Deckungsbeitrag		0
Erzielter Umsatz	5	0
Erzielte Absatz	1	0
Lieferanteil	10%	5
Kundenzufriedenheit	Schlecht	0
- Attractiveness (General):** A table with a total score of 30 / 250.

Metric	Value	Score
Informationspotenzial	Niedrig	5
Referenzpotenzial	Neutral	0
Up-Selling / Cross-Selling	Neutral	0
Wachstumspotenzial	Neutral	0
Bonität	X	0
Branchenentwicklung	Sinken	0
Preisdurchsetzbarkeit / -sensibilität	Neutral	0
Leistungsanforderungen / Beratungsintensität	Neutral	0
Umsatzpotenzial / Absatzpotential	Sinken	0
Unternehmensgröße	Groß	25
- Classification Rules:** Shows 'Klassifizierungsregel' as 'Business Parameters', 'Klassifizierungs-Typ' as 'Automatisch', and 'Klassifizierung' as 'C3'.

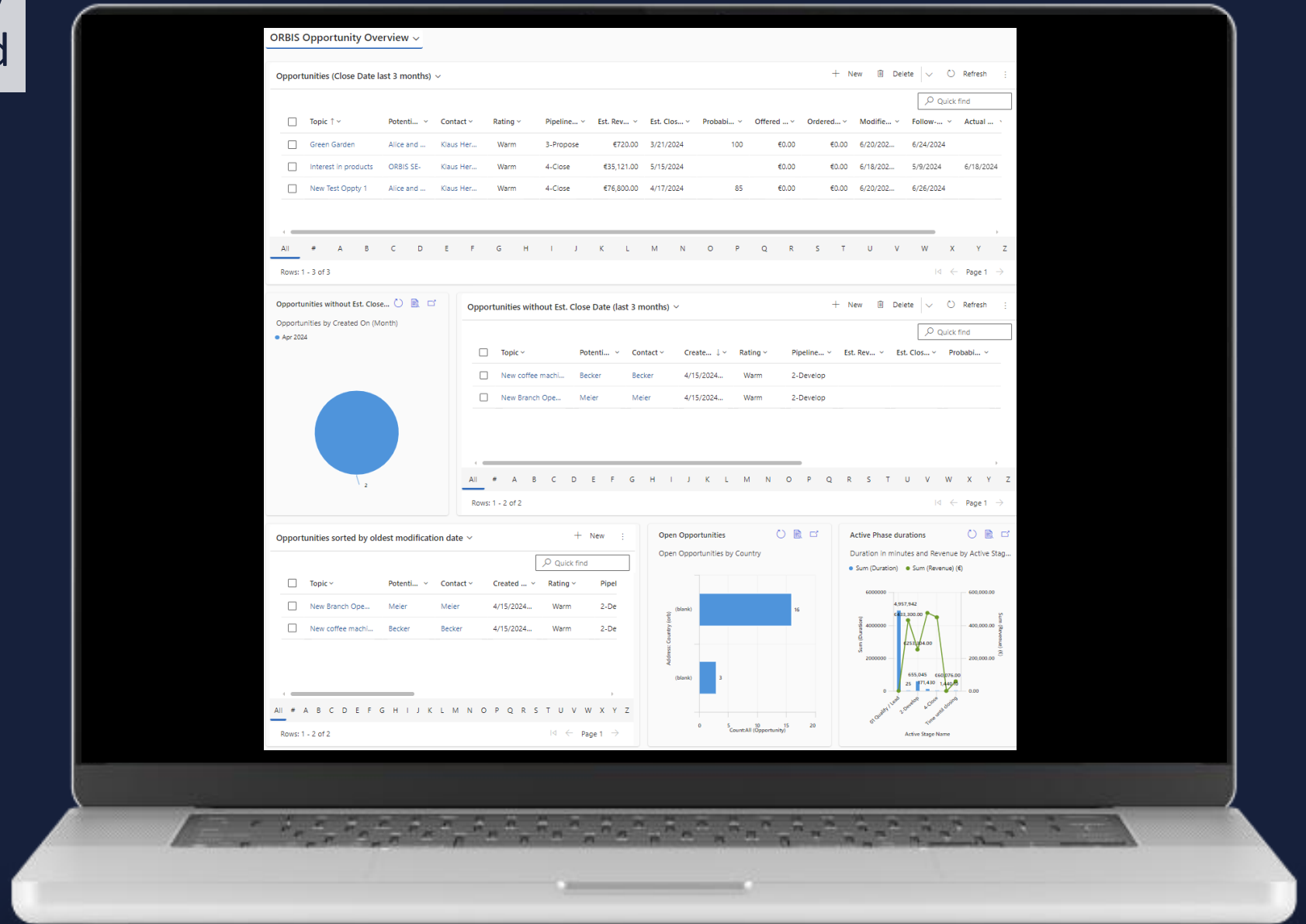


Sales Dashboard





Opportunity Dashboard



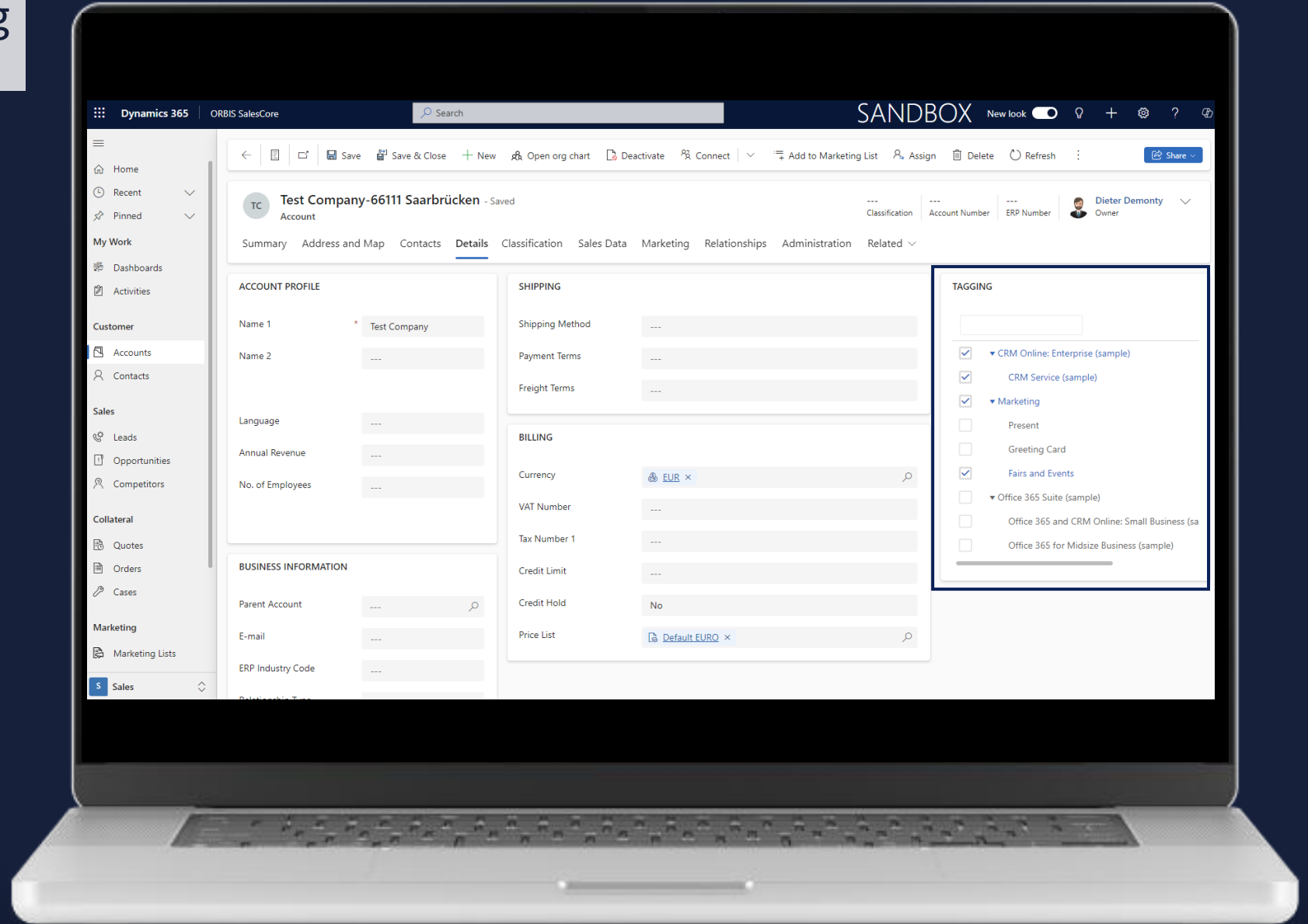


Tagging

Tagging for:

- Accounts
- Contacts
- Leads
- Opportunities

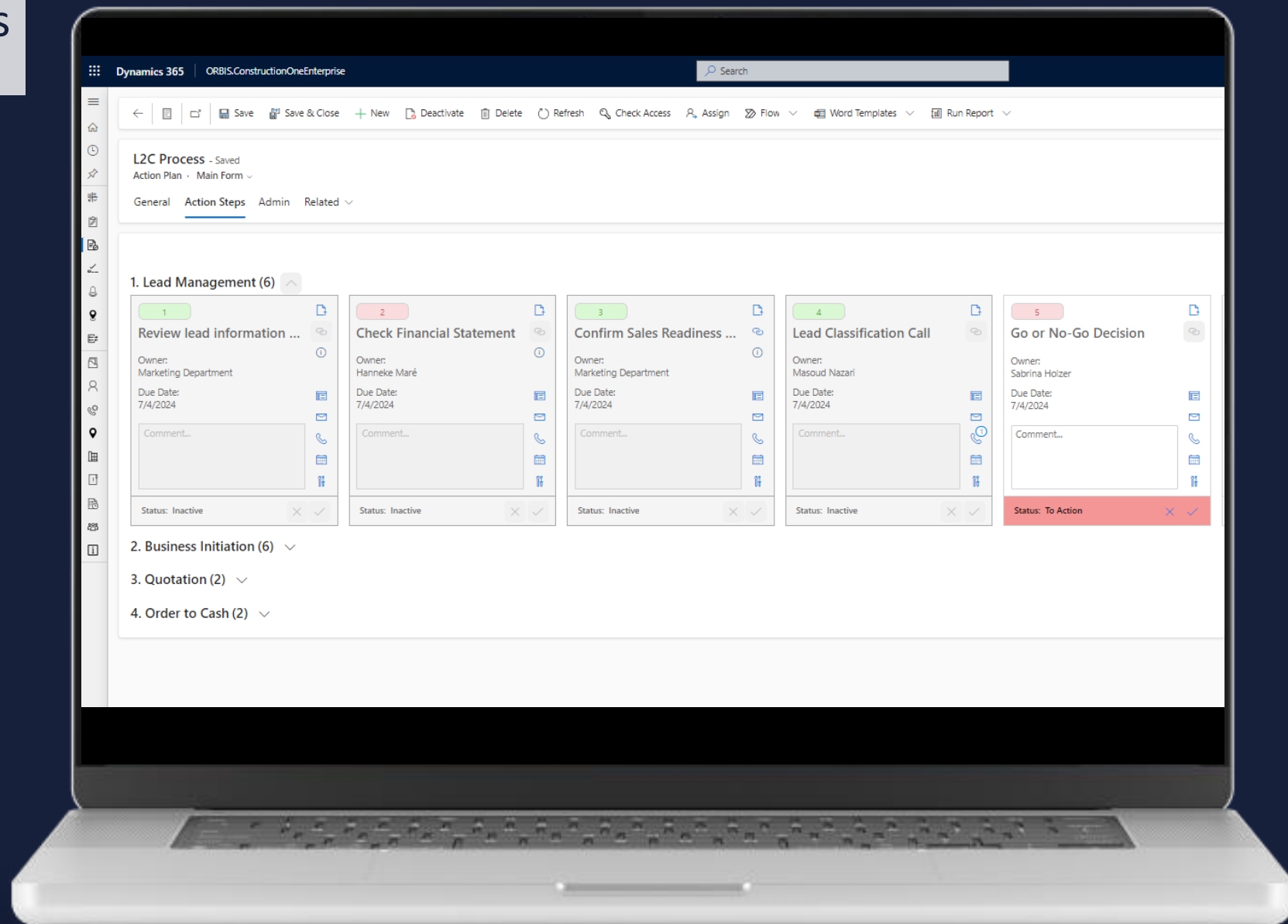
with an expandable structure view





Action Plans

- Definition, distribution, and management of action plans and action steps
- Centrally coordinated development plans for customers, leads, sales opportunities (...)
- Customizable configuration
- Seamless automation
- Smart tracking

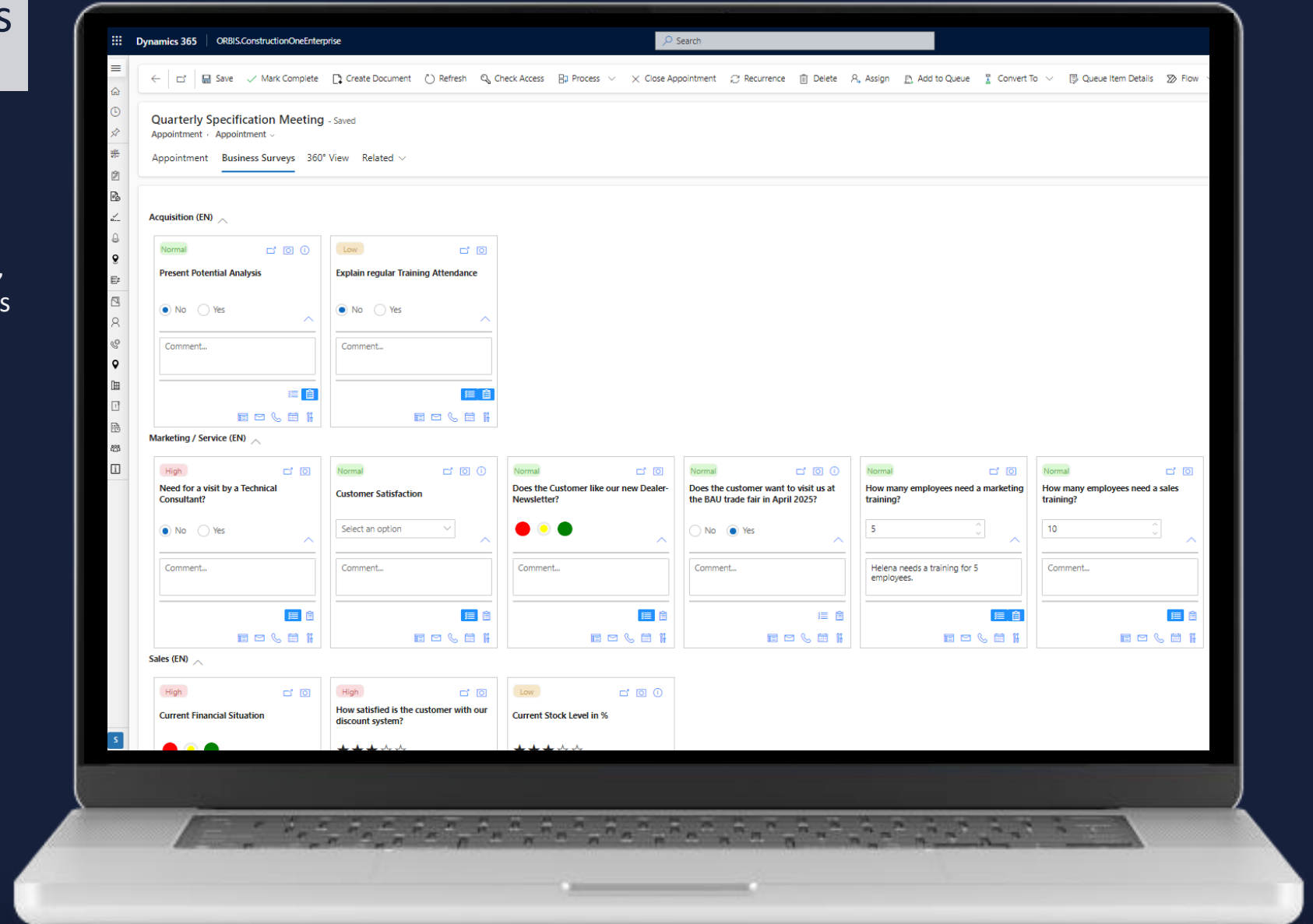




Business Surveys



- Targeted distribution of questions/checklists
- Based on country lists, campaigns, marketing lists and custom entities
- Intuitive user interface
- Targeted management of sales activities (e.g., visits, calls, etc.)
- Modern responsive design for device-independent use





Audit Management

- Collecting and weighting of customer information
- Grouping customers by score for a tailored strategy
- Identifying trends
- Insights into the behaviour, preferences, and performance of various customer groups
- Objective evaluation instead of mere assumptions
- A basis for segmenting your customers



Dealer Audit - Gespeichert
Rating

General Rating Criteria Admin Verknüpft

GENERAL

Name * Dealer Audit

Regarding Object * hagebaumarkt Bremervörde GmbH & Co. KG

Country * Germany

Rating Type * Standard

Rating Config * Standard Rating - Dealer Germany

BUSINESS TYPE

Account Business Type Dealer

EXTERNAL COMMENT

INTERNAL COMMENT

RATING CRITERIA

Außendarstellung - 10 (27)

0 (2) Anzahl der Kassen

10 (10) Outside Area

0 (15) Sauberkeit

Point of Sale - 0 (45)

0 (5) Anzahl Anwohner im Radius von 5km

0 (5) Extra Kasse Service

0 (10) Flyer an der Kasse

Valid To 12/30/2024

Erste Schritte

Erfassen und verwalten Sie alle Datensätze in der Zeitachse.

Rating Results

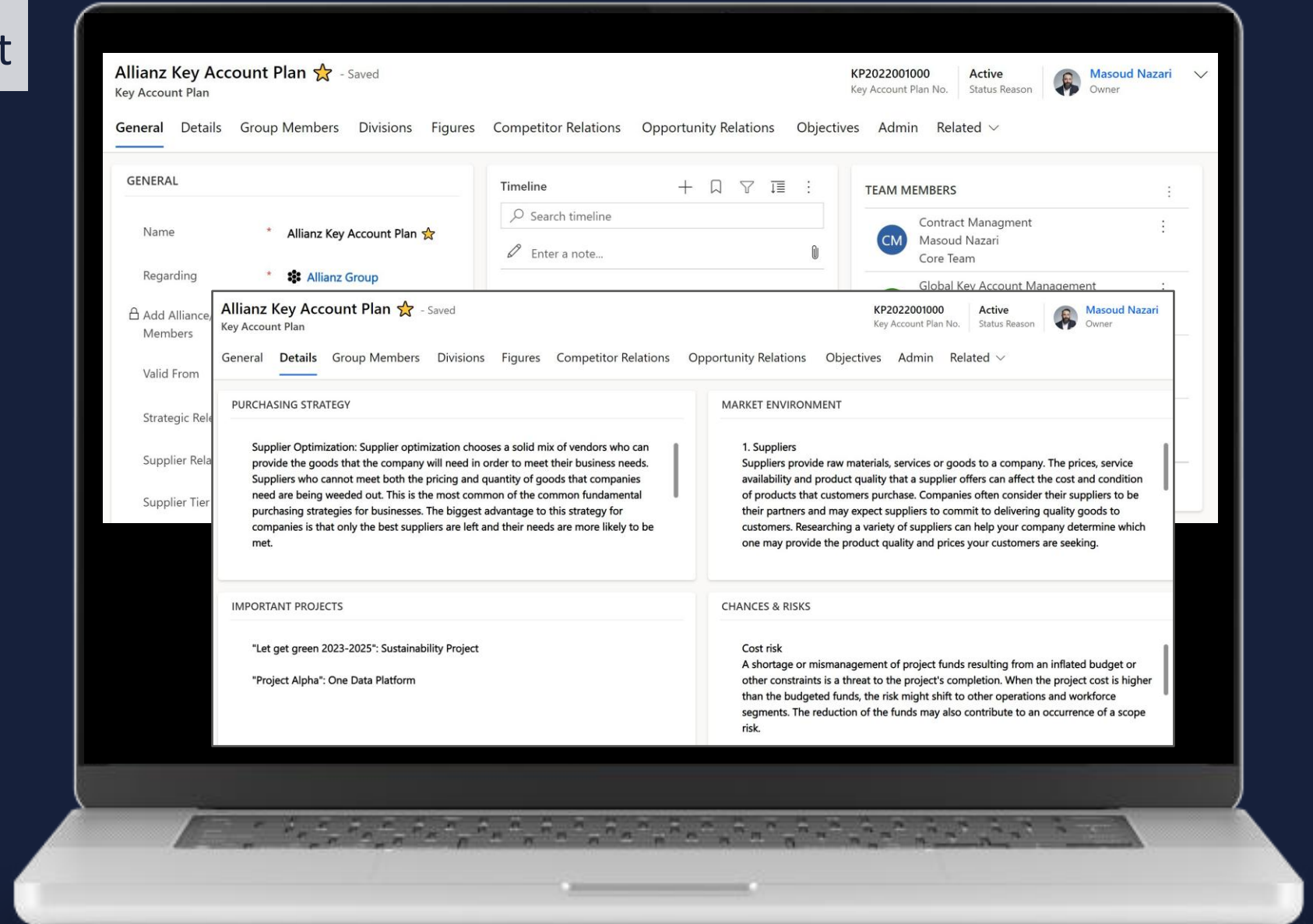
Premium Account Open Result

Very Clean POS Open Result



Key Account Management

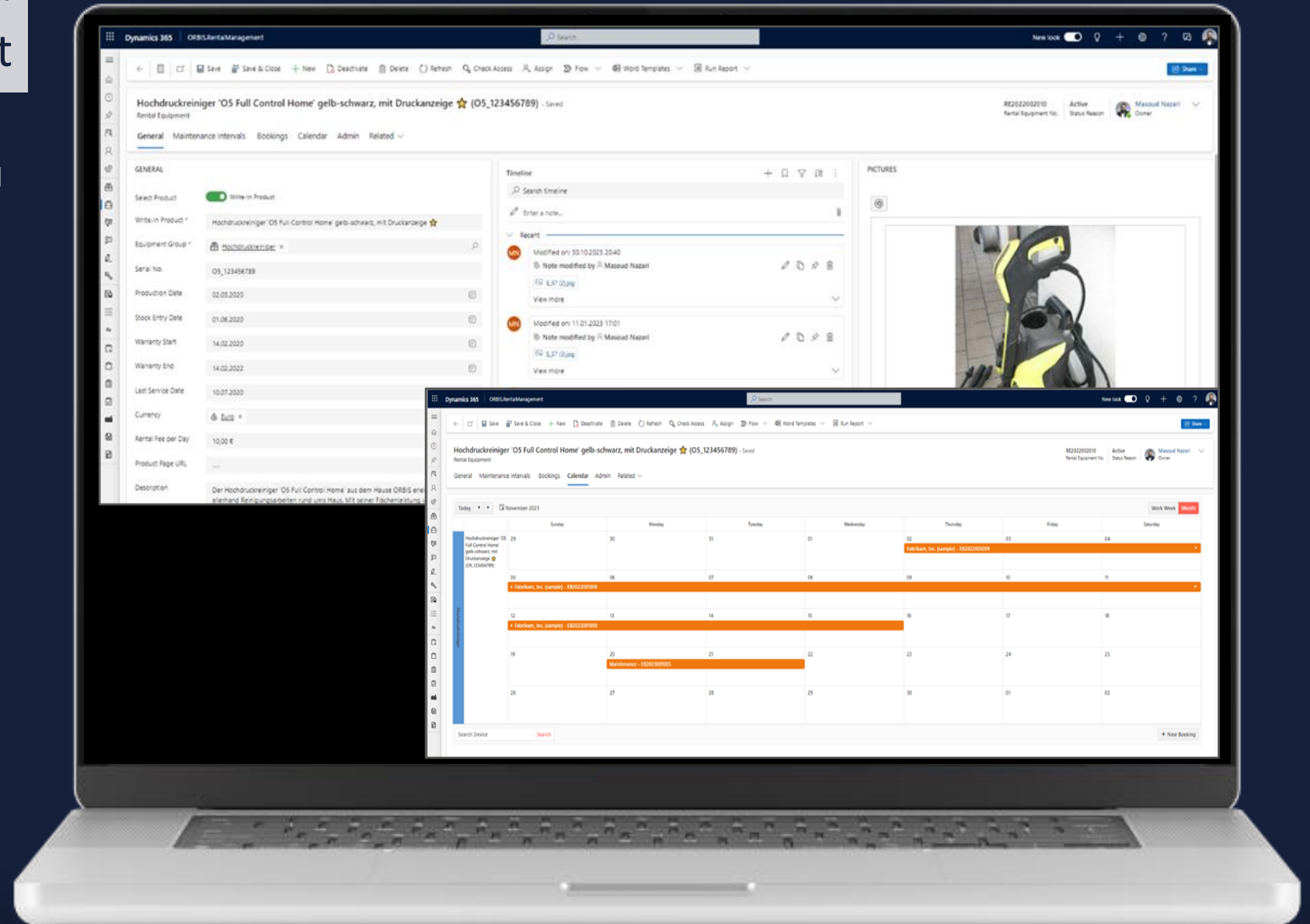
- Knowledge base for developing and nurturing your most valuable customers
- Structured key account management with clear responsibilities
- Mapping of complex corporate and association structures
- Tracking of strategic metrics and goals
- Mapping of the buying center and the interests of key stakeholders
- Linking key accounts to competitors, projects, and goals





Rental Management

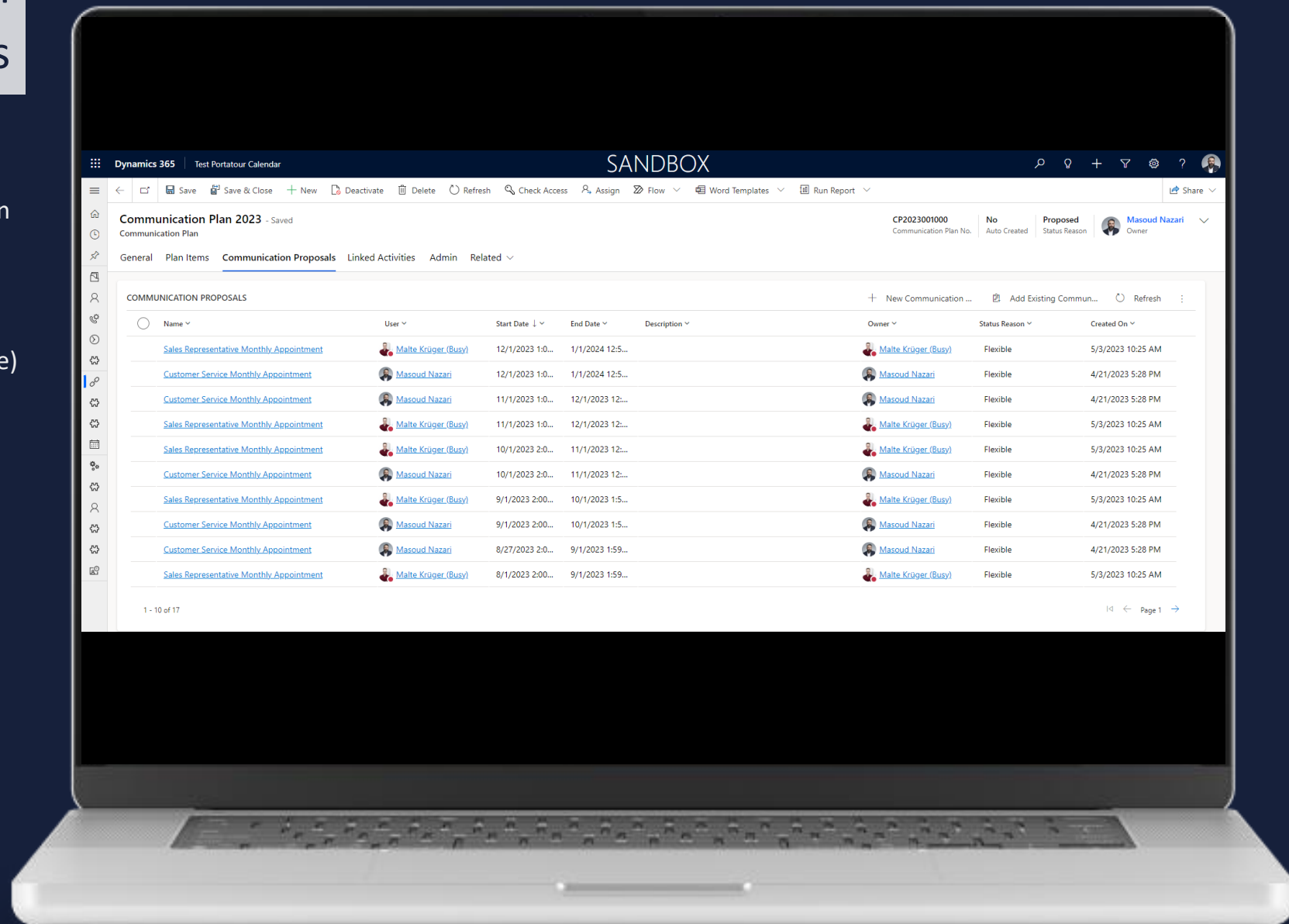
- Centralized management of rental equipment, customers, rental processes and contracts
- Planning calendar for optimal resource scheduling
- Digitized handover reports and signatures
- Planning and management of maintenance intervals
- Seamless integration with Dynamics 365





Communication Plans

- Targeted Communication: Establish communication frequencies based on customer segment (A1, B2, C3, etc.)
- Clear Roles & Channels: Define responsibilities and use appropriate channels (in person, by phone, online) for each segment
- Customizable communication plans per role and company
- Automatic generation of communication suggestions
- Template for visit suggestions in the planning calendar
- Customizable parameters such as customer segment, role, visit frequency





Route Planning

- Route optimization
- Simplified appointment scheduling
- Time savings
- Flexibility for changes & radius searches
- Detailed reporting & analytics
- Communication plans & visit suggestions based on segments and potential

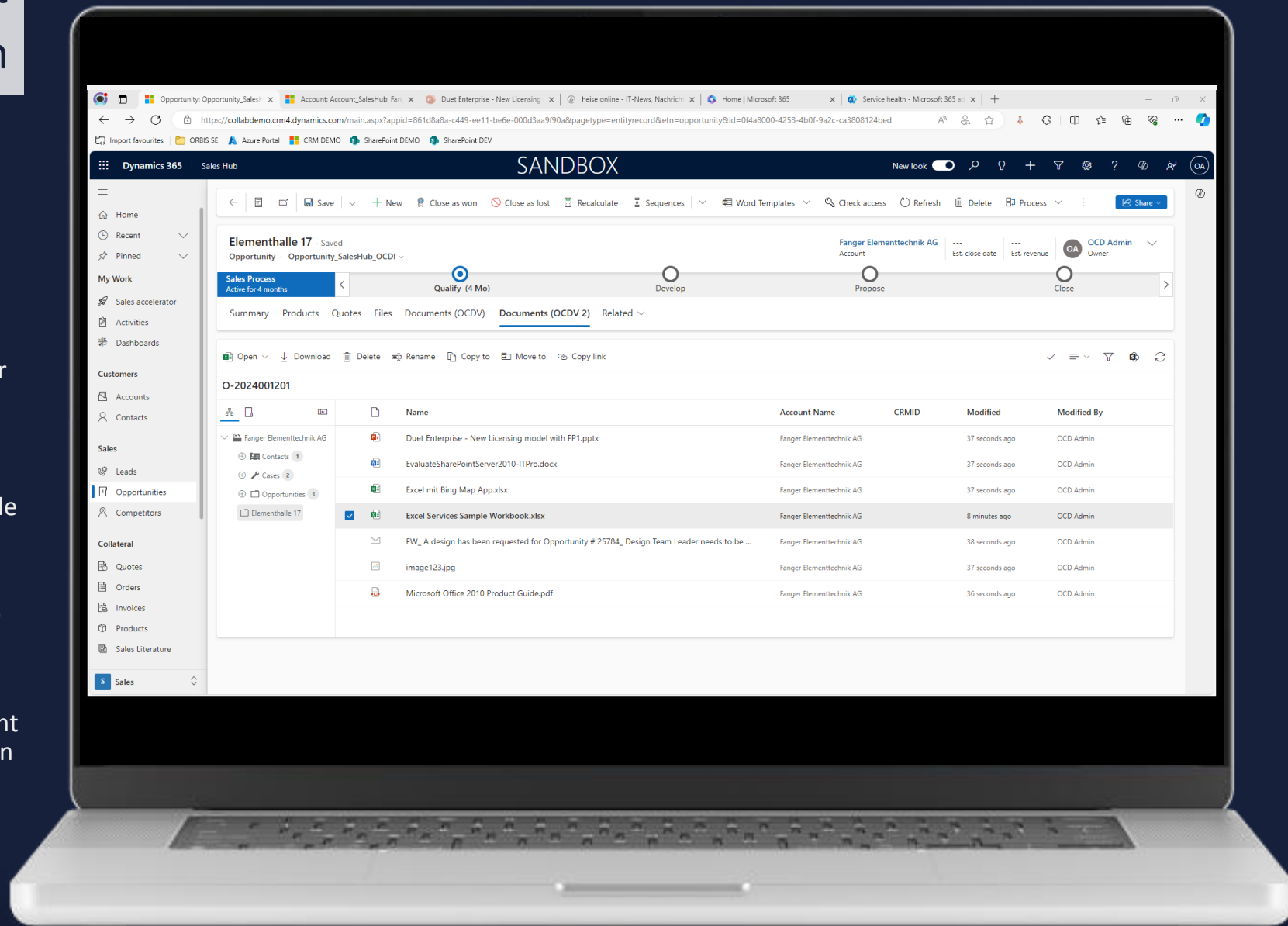
The screenshot displays the 'Active Communication Proposals' interface. On the left, a map shows a green circular radius search area centered on Bielefeld, with a red route line connecting various locations. The right side features a calendar for April 2023 with the following appointments:

Day	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	01
02	03 Privates Treffen	04 J&K WATA	05	06	07	08
09	10 Optional	11	12	13	14	15
16	17	18 BHG Baustoffe Baustoffwerke ...	19	20	21	22
23	24	25	26	27	28	29
30	01	02	03	04	05	06



SharePoint Integration

- Define a clear document structure: Pre-create folders and apply consistent naming conventions
- Manage permissions carefully: Align CRM and SharePoint permissions; restrict sensitive folders (e.g., NDAs) and separate data by business unit or country
- Use SharePoint for storage: Store email attachments in SharePoint and access them via links to create a single source of truth
- Reduce costs: Lower Dataverse storage usage and potentially reduce CRM licensing by relying on SharePoint
- Improve collaboration: Use SharePoint features such as co-authoring, version history, and powerful search.



1

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2

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3

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4

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5

HOW TO START / GET IN TOUCH

GET IN TOUCH

» You can contact Tobias Krämer directly to discuss your options

Tobias Krämer

Senior Account Manager

Phone: +49 (174) 7832041

Email: tobias.kraemer@orbis.de



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Email: info@orbis.de

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Commercial Register Court: Amtsgericht Saarbrücken, HRB 108223
Board of Management: Stefan Mailänder (Board spokesman),
Damien Schirrer, Frank Schmelzer
Chairman of the Supervisory Board: Ulrich Holzer

