

Harness the full potential of Dynamics 365 for organizations

Driving sustainable business success





Contents

The case for Microsoft Dynamics 365 innovation	4
Overcome challenges in Microsoft Dynamics 365 innovation	6
Key trends shaping Microsoft Dynamics 365	8
Microsoft Dynamics 365 innovation case study	10
Maximize Microsoft Dynamics 365 impact	12
The talent advantage in Microsoft Dynamics 365 transformation	14
Bridge the Microsoft Dynamics 365 talent gap	16
The future of Microsoft Dynamics 365	18



The case for Microsoft Dynamics 365 innovation

Microsoft Dynamics 365 is a cloud-based suite of intelligent business applications that combine Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) functions. Since its release in 2016, Dynamics 365 has evolved from a set of distinct individual products into a unified platform with innovative Al and ML capabilities.

Unfortunately, Dynamics 365's overall value often goes unrealized when organizations limit their use of the its applications to merely the fundamental CRM functionalities, such as sales and customer service. By doing so, organizations neglect to leverage Dynamics 365's other tools such as its marketing, finance, supply chain management, and Power Platform integrations, leaving money and valuable opportunities for innovation on the table.

Organizations that proactively implement the extensive customization and automation capabilities within Microsoft Dynamics 365 and train their workforce on its intelligent capabilities will be well-positioned for sustained growth, better customer engagement, and a higher return on investment.

From well-integrated systems to better compliance, customer personalization and more, a well-configured Dynamics 365 ecosystem ensures organizations are equipped to compete and scale amid increased demands for agility, flexibility and datadriven decisions.



Roadblocks to innovation:

1. Disconnected systems delay critical applications

When Dynamics 365 tools don't work together, development stalls, which results in increased costs. As a solution, the AI Builder in Dynamics 365 PowerApps enables teams to rapidly develop no-code applications by utilizing straightforward prompts. This accelerates app deployment to meet market demands and reduces development time.

2. Manual processes reduce productivity

Operations are often impeded by repetitive tasks such as invoice approvals. Almost <u>75%</u> of employees say they spend up to two hours daily on low-impact tasks and meetings. Microsoft Power Automate with Dynamics 365 automates workflows, reducing time spent and enabling teams to dedicate more time to innovation.

3. Compliance risks create expensive penalties

Industries subject to regulations such as HIPAA or GDPR may experience audit failures due to inadequate monitoring, which may result in penalties and damaged reputations. Dynamics 365 Industry Cloud automates compliance monitoring, reducing auditing preparation needs while minimizing liability.

4. Poor personalization stifles customer engagement

When customers feel undervalued, they disengage. Dynamics 365 Customer Insights consolidates data from sales, service, and marketing to develop hyper-relevant offers, which leads to increased conversions and recurrent purchases.



Overcome Microsoft Dynamics 365 challenges

Microsoft Dynamics 365 eliminates silos between finance, sales, logistics, and HR. While implementing Dynamics 365 may be difficult, it can be made simple through careful data migration and workforce training. With the right processes in place, organizations can effectively utilize the advanced AI and analytics capabilities within Dynamics 365.

Whether you are transitioning from existing ERP and CRM solutions or introducing these systems for the first time, the process can be daunting.

The complexity and fragmentation of ERPs and CRMs can hinder teams, while poor Microsoft Dynamics 365 integration causes data loss, delays, and errors, making operations inefficient. That's why streamlining systems is crucial for smooth workflows and accurate data.

Your organization's performance may be adversely affected by these challenges, which may result in revenue loss, increased costs, and customer dissatisfaction.

Organizations must overcome the challenges of poor integrations, disconnected systems and compliance risks to achieve optimized operational efficiency with Dynamics 365.

Key challenges:

Data migration: The initial Dynamics 365 hurdle that organizations face is data migration to the new platform. Organizations store data using various methods; When implementing Microsoft Dynamics 365, the task of migrating this data without data loss can be challenging.

Customization and configuration: Businesses choose Microsoft Dynamics 365 for its customization features, which allow the platform to meet specific business needs. This process can stall if organizations custom configure the platform without a thorough analysis and plan from the start.

Integration with existing systems: When implementing Dynamics 365, seamless integration with current ERP and CRM systems is crucial. Careful planning is essential, as poorly executed integrations can lead to performance issues and even system errors, which is why a precise integration approach is vital.

Inadequate testing: Performance errors, system flaws, and other unnecessary issues may result from inadequate testing, causing unintended confusion and system failures. In addition, it may cause delays in your organization's projects and impact timelines. Always conduct a comprehensive system test to guarantee robust capabilities and readiness.





Key trends shaping Microsoft Dynamics 365

Microsoft Dynamics 365 has undergone significant changes, and now focuses on Al-powered insights, unified customer data platforms (CDPs), seamless integrations with Power Platform, and industry-specific solutions.

Dynamics 365 boasts Al-driven analytics, which empowers leaders to make informed decisions, optimize resource allocation, and adjust data-based strategies. This allows businesses to receive real-time data for actionable insights.

As enterprises expand, their requirements grow as well. Dynamics 365 is engineered to accommodate expanding operations effortlessly without incurring substantial costs or compromised performance.

To preserve agility and ensure long-term ROI from their Dynamics 365 investment, organizations must integrate AI and automation intelligently into their Dynamics 365 ecosystems. That means leveraging the right organizational insights to formulate that plan from the get-go.

- 1. Personalization and intelligent automation: Microsoft has consistently enhanced its AI capabilities within Dynamics 365, helping organizations optimize processes and forecast outcomes. AI-powered features on the platform include Copilot, Predictive Analytics, and Natural Language Processing (NLP).
- 2. Platform integration and development: The incorporation of Al into Power Apps enables users to develop sophisticated applications through no-code prompts, significantly reducing development time. Dynamics 365 offers seamless integration with Office 365, Azure, and Teams, allowing users to access CRM and ERP data without abandoning their collaboration environment.
- 3. Industry solutions and responsible business: Microsoft's Dynamics 365 strategy includes various industry-specific solutions that are individually designed to address specific business challenges. This includes a variety of tools for supply chain management, such as IoT-enabled inventory monitoring and predictive maintenance for equipment. Another tool helps e-commerce companies deliver personalized shopping experiences using data-driven customer insights.





Microsoft Dynamics 365 innovation case study

A leading bottling company, G&J Pepsi, was challenged to maximize customer service, revenue, and cost savings following the COVID-19 pandemic, as their existing system's inability to efficiently schedule, maintain, and deploy field technicians was causing operational inefficiencies.

To expedite its end-to-end customer journey by unifying cross-functional support and eliminating barriers to customer visibility, G&J Pepsi implemented Dynamics 365 Sales and Dynamics 365 Field Service in 2021 to establish a customer engagement management (CEM) platform.

CEM was a game-changer, as it provided sales, field service, and leadership with real-time visibility into customers, which teams did not have previously.

G&J Pepsi uses Dynamics 365 Field Service and stores its data in Microsoft Dataverse. When a salesperson (BDR) requests equipment, a Power Automate flow triggers a work order.

This work order, also stored in Dataverse, schedules a field technician to prepare and deliver the equipment.

Dynamics 365 lets schedulers assign the optimal technician to a job by viewing all available locations, not just a few. By using the Field Service mobile app, field service technicians can optimize travel time by using the app's map and routing features. They also display the current status to indicate whether they are on-site or travelling. The Dynamics 365 mobile app also makes it possible for field technicians to access all the relevant customer information, including service tasks, customer information, and product requirements. Through minimal development effort, G&J Pepsi enhanced its mobile app so that field technicians could generate service reports at customer sites and email them directly to other departments.

The implementation of these Dynamics 365 features resulted in \$30 million in profits, and using G&J Pepsi's scheduling system, technicians were able to complete more service calls per day. By improving maintenance processes, downtime for equipment was reduced. The performance of technicians improved as a result of better access to information and remote support, leading to higher first-time fix rates and increased customer satisfaction.

G&J Pepsi is now considering using Microsoft Copilot to help frontline employees solve real-world challenges, such as optimizing scheduling and service flows based on data analysis.

Technology experts and AI experts will be employed to promote awareness of Copilot's capabilities to transform customer experiences. G&J will also benefit from Microsoft Azure AI, and Power Automate as they weave a digital thread through their daily business operations to help them succeed.



"We truly see Microsoft as an organization that is tied to the success of G&J Pepsi, not just the success of the department, but as a true collaborator, where we're getting our voice heard on some of the challenges and opportunities that we have with the products."

Brian Balzer

Executive Vice President
Digital Technology & Business Transformation, G&J Pepsi-Cola Bottlers



Maximize Microsoft Dynamics 365 impact

Modern businesses thrive on agility, which is why Microsoft Dynamics 365 seamlessly integrates with Microsoft Teams and Microsoft 365 (Excel, Powerpoint, Word, etc.), simplifying adoption for existing Microsoft users.

Meanwhile, its low-code platform facilitates easy configuration, allowing teams to build custom apps and integrate third-party solutions.

As a cloud-based solution, Dynamics 365 offers secure access to business systems from anywhere. It centralizes core functions around finance, sales, marketing, meetings, and customer service, combining them into a unified platform, while built-in Al automates workflows and enhances decision-making.

Data consolidation from multiple sources provides valuable insights, helping organizations scale with the right intelligence to back their operations.

Finally, Dynamics 365 runs on Microsoft Azure, ensuring enterprise-grade security and full compliance with global data privacy regulations like GDPR.

Unified customer view & insight: Dynamics 365 consolidates all customer data, allowing for a comprehensive, real-time perspective. This allows businesses to make informed decisions by personalizing interactions, understanding customer journeys precisely, and utilizing pre-defined KPIs. This results in improved customer relationships and targeted strategies, which in turn drive sales growth.

Scalable and flexible solutions: Dynamics 365 offers a variety of subscription models that allow organizations to pay only for the services they use. This optimizes costs and permits scaling as business requirements change.

Enhanced productivity and efficiency: Dynamics 365 provides applications and productivity tools that facilitate daily tasks and enhance efficiency. By streamlining workflows and increasing overall productivity, users can effortlessly locate and employ pertinent applications. This enables employees to work more efficiently, resulting in enhanced operational performance and faster task completion.

Real-time analytics and actionable insights: Dynamics 365 provides real-time insights and predictive recommendations through built-in analytics tools, which include Power BI and Cortana Intelligence. This enables businesses to anticipate trends, make data-driven decisions, and take proactive measures. It also allows businesses to remain competitive and adapt to market changes.

Security and data protection: Dynamics 365 implements rigorous security controls, such as physical data center protection and data access restrictions, to guarantee the security of both data and applications. This cloud-based solution guarantees a secure environment, ensuring compliance and safeguarding sensitive information. In addition to safeguarding valuable business assets, this fosters trust with customers.



The talent advantage in Microsoft Dynamics 365 transformation

Dynamics 365 drives intelligent business transformation by unifying AI, analytics, and operations to enable data-driven decisions. Companies that prioritize hiring talent skilled in Copilot workflows, AI-powered analytics, and industry cloud solutions will streamline operations and gain valuable insights.

Organizations today need professionals who automate tasks like customer service and billing using Copilot, and connect data to anticipate trends and reduce risks. Dynamics 365 professionals also ensure compliance and efficiency by simplifying application development with Power Apps and by creating custom industry solutions.

Organizations should invest in these roles or risk falling behind as they strive to unlock growth, save resources, and increase agility. Securing the right talent is crucial to ensure your organization is not underutilizing Dynamics 365.



Dynamics 365 Business Consultants provide guidance to organizations on how to align their business objectives with Dynamics 365. They evaluate workflows and suggest process enhancements through the utilization of Dynamics 365 modules like Microsoft Al Builder, Power Platform, and more, to optimize efficiency.



Dynamics 365 Technical Developers are responsible for the customization and extension of Dynamics 365 applications to accommodate intricate business requirements. They implement advanced configurations like Power Automate and Power Apps. They also develop custom modules, workflows, and integrations with Azure services or third-party tools.



Dynamics 365 Solution Architects develop Dynamics 365 ecosystems that align with enterprise strategies. They design cross-module solutions that pertain to finance, sales, and customer Insights. They also integrate services with Microsoft Cloud services and ERP/CRM legacy systems.



Dynamics 365 DevOps Engineers automate CI/CD processes using Azure DevOps or GitHub Actions to manage deployment pipelines and environment stability for Dynamics 365. They supervise releases in prototyping, testing, and production environments.



Dynamics 365 data & AI specialists are responsible for the implementation of AI and machine learning (ML) models as well as the use of advanced analytics within Dynamics 365. They also optimize Dataverse integrations that pertain to AI and ML.



Bridge the Microsoft Dynamics 365 talent gap

There is fierce competition for Dynamics 365 talent today, and this is compounded by the demand for custom integrations. Failing to recruit the right talent leads to reduced efficiency and diminished ROI.

To close this gap, organizations must adapt their recruitment strategies and hire candidates with cross-functional expertise in business process optimization, AI-enabled automation, and enhanced customer experience strategies.

Organizations should prioritize comprehensive internal training programs, robust mentorship initiatives, and strategic partnerships with Microsoft Dynamics 365 training providers. These efforts build a sustainable and adaptable talent pipeline, increasing employee retention by fostering a sense of career growth and achievement.

Strategic talent acquisition beyond core certifications: Move beyond solely focusing on standard Dynamics 365 certifications. Organizations should prioritize candidates who display strong analytical problem-solving, cross-departmental collaboration skills, and a proven ability to adapt to the rapidly evolving Dynamics 365 ecosystem.

Cultivating internal expertise for sustained Dynamics 365 growth: Invest in strategic, structured internal training programs focused on emerging Dynamics 365 functionalities, including Power Platform integrations and Azure alignments. Build internal expertise to ensure your team remains proficient and adaptable.

Leverage AI for predictive Dynamics 365 talent alignment:

Implement AI-powered talent acquisition tools to identify candidates who not only meet current Dynamics 365 role requirements but also possess the potential to excel in future platform expansions and advancements.

Foster knowledge transfer through Dynamics 365 mentorship:

Establish comprehensive mentorship programs that pair new Dynamics 365 professionals with experienced Solution Architects and consultants, accelerating onboarding, deepening platform knowledge, and fostering a collaborative environment for knowledge sharing and innovation.

Establish career paths for talent retention: Develop transparent and well-defined career progression paths within your Dynamics 365 roles. Organizations should map advancement opportunities for functional consultants, developers, and administrators. This strengthens long-term workforce stability and minimizes attrition. The key is to cultivate talent that adapts alongside your organization's Dynamics 365 technology.



The future of Microsoft Dynamics 365

Al and the Cloud are transforming business technology through enhanced integrations and no-code personalization, and Microsoft Dynamics 365 is a pivotal tool in this evolution. Its significance lies in its role as a comprehensive data lake, consolidating information for actionable insights rather than just functioning as an ERP or CRM.

Dynamics 365 also centralizes essential business data, ensuring consistent data visibility across the organization, thereby minimizing discrepancies. This unified data environment provides deeper organizational performance insights, which facilitates informed decision-making and agile responses.

Dynamics 365 is particularly powerful due to its compatibility with other Microsoft tools. Integrating it with Office 365, LinkedIn, and Azure unlocks valuable data insights, promoting superior teamwork and data-driven strategies.

Choosing to leverage Dynamics 365 ultimately prepares your business for an Al and cloud-driven future.

Al-powered features: Microsoft's Al assistant, Copilot, is already revolutionizing productivity by automating repetitive tasks, generating insights, and assisting with data analysis.

Organizations can anticipate an increased reliance on natural language processing (NLP) for conversational analytics. This will allow users to query intricate datasets straightforwardly and receive immediate actionable insights.

Enhanced customer insights and engagement: Integrating Azure Synapse Analytics and Power BI empowers businesses to deliver hyper-targeted campaigns and product recommendations by revealing deep consumer behavior insights. This will enable businesses to establish more precise audience segments by utilizing live data, rather than static profiles. The forthcoming features of Dynamics 365 will prioritize providing consistent, personalized experiences across various touchpoints, such as chatbots, social media, and email.

One cohesive platform: Microsoft integrates Dynamics 365 directly into Teams, allowing users to access CRM and ERP data without abandoning their collaboration environment. Alpowered meeting summaries, task assignments, and follow-up reminders will be integrated with Teams and directly attached to Dynamics 365 records. Advanced analytics and machine learning applications will be enabled by quicker, more scalable access to large datasets.

Better security and compliance: Dynamics 365 will implement a zero-trust model, guaranteeing that each access request undergoes a comprehensive validation process. It will be integrated with Microsoft Defender to offer real-time threat detection and automated responses for Dynamics 365 environments. Compliance for global organizations will be simplified by improved tools for managing GDPR, CCPA, and other regulatory requirements.



About Procom

The people who power performance

Procom is a global leader of Microsoft Dynamics 365 talent staffing, IT staffing, and contingent workforce solutions, with over 45 years of experience as North America's leading IT staffing firm. Procom's expertise combined with an extensive network of IT professionals enables organizations to build high-performing teams that drive successful Dynamics 365 implementations and solutions.

We understand that people are at the heart of every successful implementation, and our proven track record of matching exceptional talent with transformative projects has helped thousands of organizations achieve their SaaS and PaaS goals. Whether you need to scale your IT team, access specialized expertise, or build long-term cloud capabilities, Procom's comprehensive staffing solutions can help you navigate the complex landscape of cloud transformation, CRM planning, and implementation.

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