

# Transforming client relationship management with Microsoft Dynamics 365

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As business environments grow increasingly complex, managing customer relationships is more challenging yet more critical than ever. A powerful client relationship management (CRM) solution is no longer a luxury; it is a necessity. These tools help organisations stay competitive, efficient, and customer-centric in today's digital-first economy.

## Why businesses need CRM solutions

01

### Centralised customer data

Stores all customer interactions, contact details, transaction histories, and preferences in one unified database built across multiple touchpoints, including websites, mobile apps, social media, and emails. Eliminates data silos across sales, marketing, and service teams.

02

### Complete consumer visibility

Provides a holistic profile of each customer, including past purchases, support tickets, and communication logs anytime, anywhere. Empowers teams to personalise outreach and anticipate needs.

03

### Sales productivity

Automates repetitive tasks such as data entry, follow-up reminders, and quote generation. Lets sales reps focus on selling—not administration—boosting win rates and shortening deal cycles. Shares customer notes, tasks, and calendar events transparently across departments.

04

### Data-driven insights and forecasting

Real-time dashboards and reports surface pipeline health, sales forecasts, and campaign ROI in real time. Enables leaders to make informed decisions and quickly reallocate resources.

05

### High-quality customer service

Automates routine enquiries, tracks support cases, service level agreements (SLAs), and resolution times. Equips agents with knowledge articles and case histories, speeding up first-contact resolution.

06

### Scalability & customisation

Grows with your business—add users, modules, and integrations (ERP, marketing automation, chatbots) as needed. Tailors workflows, fields, and business rules to your unique processes.

07

### Smart customer retention and engagement

Identifies at-risk customers through usage patterns and sentiment analysis. Automates renewal reminders and personalised retention campaigns. Analyses purchase histories and product interests to surface relevant recommendations.

08

### Regulatory compliance and data security

Centralises consent management, audit trails, and data handling policies. Leverages enterprise-grade security controls (role-based access, encryption).

# Why Grant Thornton Bharat

At **Grant Thornton Bharat**, we combine the capabilities of **Microsoft Dynamics 365**, **Power Platform**, and **Azure Services** to deliver a truly comprehensive and intelligent **Client Relationship Management (CRM)** solution.

With a dedicated 30-member core team and access to a flexible pool of 500 experts, we bring decades of experience across industries — BPO, NBFC, Manufacturing, Fintech, Retail, and Oil & Gas.

Our expertise in Microsoft's ecosystem powers CRM solutions that elevate customer experiences, improve efficiency, and ensure compliance.



## How we leverage these technologies



### Microsoft 365 – Enabling seamless collaboration

- Develop agile and flexible solutions by incorporating AI and intelligence through built-in cognitive services
- Leverage an extensible low-code platform that enables all users to create transformative solutions
- Combine multiple data sources within a single application to support processes spanning systems



### Power Platform – Driving automation and analytics

- Uses Power Apps to create customised solutions for sales, customer service, and operations
- Leverages Power Automate to streamline workflows, eliminating manual inefficiencies
- Empowers decision-making through Power BI, offering actionable insights from customer data



### Azure Services – ensuring scalability and security

- Provides cloud-based infrastructure for high availability, scalability, and data security
- Integrates AI and machine learning to personalise customer interactions.
- Uses Azure Integration services and API management for seamless integration across enterprise applications

# Key offerings

## Microsoft Dynamics 365 customer engagement applications

- Configuration and customisation of sales, customer service, field service, and marketing modules as per business requirements
- Implementation of omni-channel customer service and contact center with external channels like WhatsApp
- Integration with Microsoft and third-party systems
- Business process automation using workflows
- User training, support, and change management
- Data migration from existing or legacy applications into Microsoft Dynamics 365 application's Dataverse
- Application performance optimisation
- Configuring Copilot across sales, customer service, field service, and marketing modules

## Power Platform

- Development of low-code and no-code apps using Power Apps
- Automation of business processes with Power Automate
- Interactive dashboards and data visualisations using Power BI
- Intelligent, Gen AI-enabled chatbots and virtual assistants using Copilot Studio Agents
- Development of secure, low-code external websites for customers and partners, with role-based access control and identity management

## Azure-based solutions

- Logic apps: Automates SAP Master and data syncing between multiple systems
- Function app: Acts as a single touchpoint for CRM system data
- API management: Enables seamless integration with enterprise apps
- Blob storage: Archives historical data accessible via CRM virtual tables
- WhatsApp service: Integrates Azure Bot with Dynamics 365 for customer support



# Driving impact across sectors

Our cross-industry expertise ensures scalable impact, no matter the business landscape.



## Manufacturing and automobile

### Our solutions

- Sales automation
- Customer service automation
- Dealer management system
- Customer insights
- Repairs management
- Customer visit management
- ERP connection



## Healthcare and diagnostics

### Our solutions

- Doctors app management
- Patient app and portal management
- Omni-channel management
- Sample collection – diagnostics
- Patients' insights for hospitals
- HMS connectors



## BFSI

### Our solutions

- Fleet on street automation
- B2B, B2C, B2B2B & B2B2C Sales
- Customer insights
- Customer service automation
- Omni-channel management
- Risk and compliance management
- Core system connectors



## Retail and consumer goods

### Our solutions

- Sales and customer insights
- Customer service automation
- Inspections management
- Distributor management
- Tour planning and visits
- Inventory management
- ERP connectors



## Oil & gas

### Our solutions

- Lead to cash automation
- Primary and secondary customer service
- Primary and secondary customer insights
- Distributor operations management
- Tour planning and distributor visits
- Discount and margin erosion engine
- Incentive management



## ITeS

### Our solutions

- Salesforce automation
- Lead to quote management
- Pipeline management
- Revenue management
- Customer insights and 360° view
- Contract and renewal management



## Contact us to build a relevant and responsive CRM solution:



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