

Unlocking the Full Power of Dynamics 365 CRM

October 2025

Microsoft
Partner

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U.S. Presence

Leading U.S. Firm

\$2.2bn

Revenue (FY 2025)*

76

Markets

30

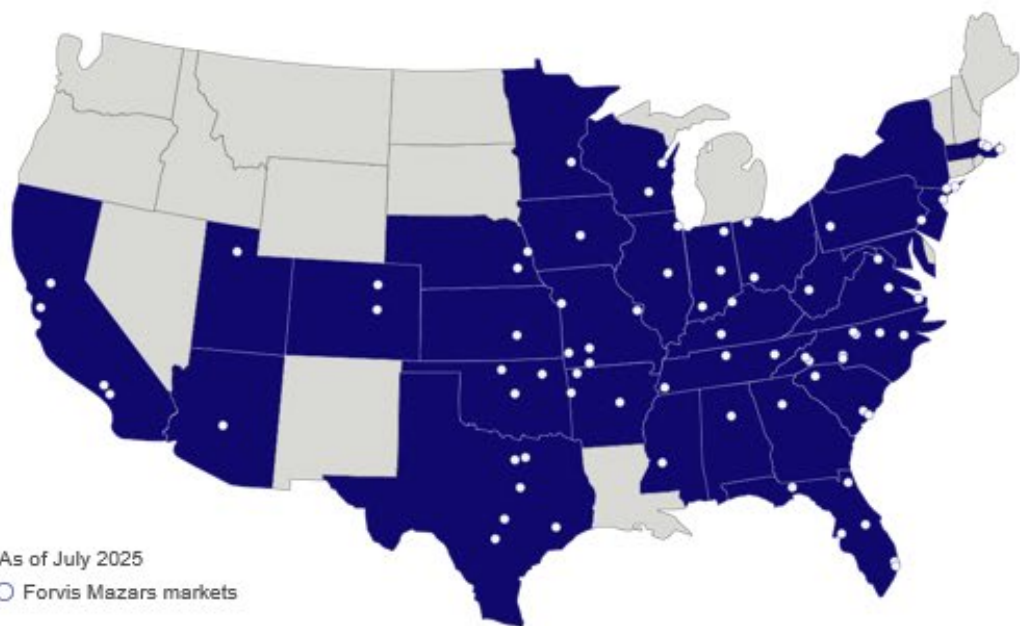
States

600+

Partners & Principals

7,000+

Employees



Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster
Chestnut Hill

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons

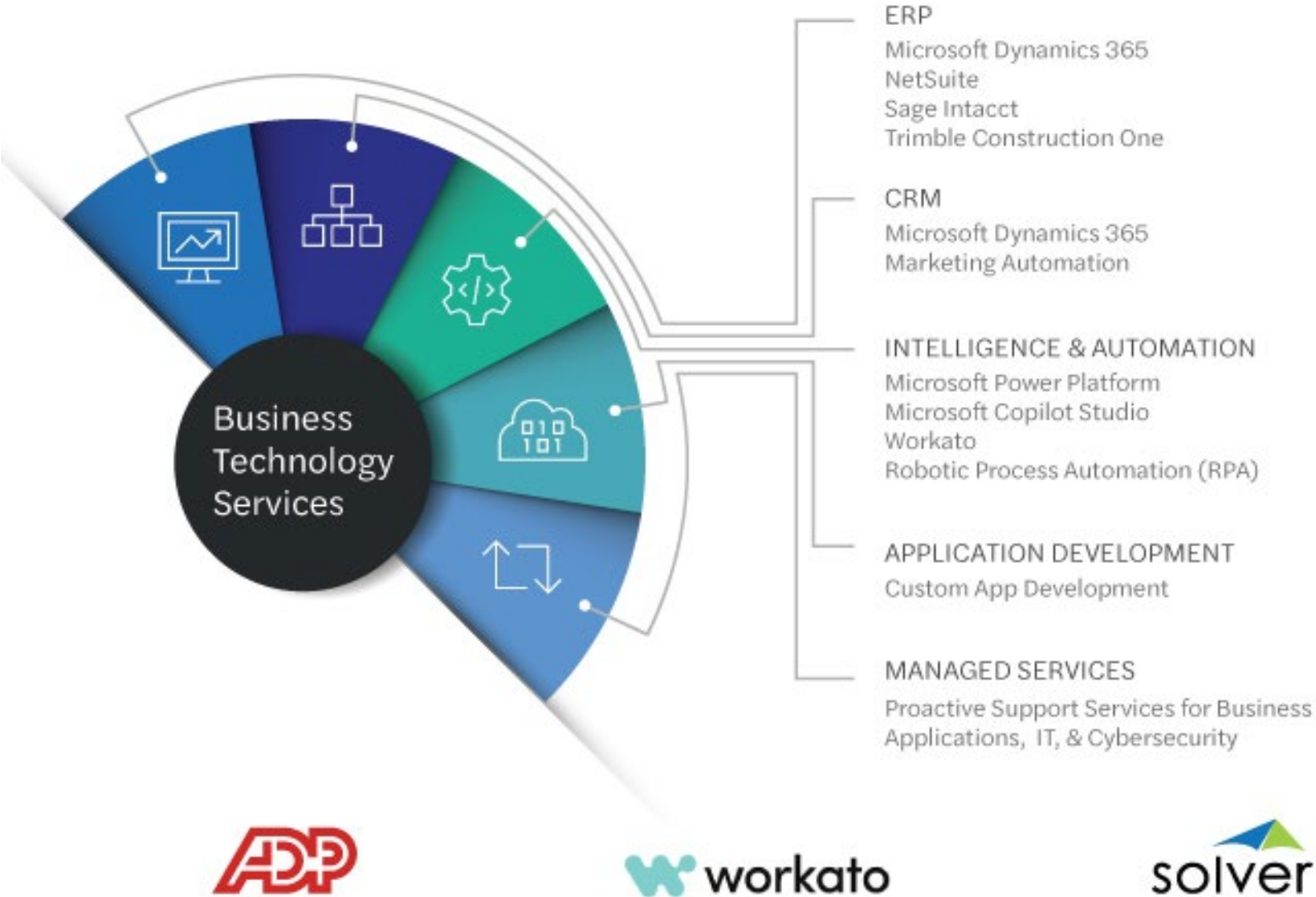
West Virginia
Charleston

Wisconsin
Appleton
Madison

*FY 2025 revenue: period ending 5/31/25.

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Premier Technology Partnerships



Microsoft Partner













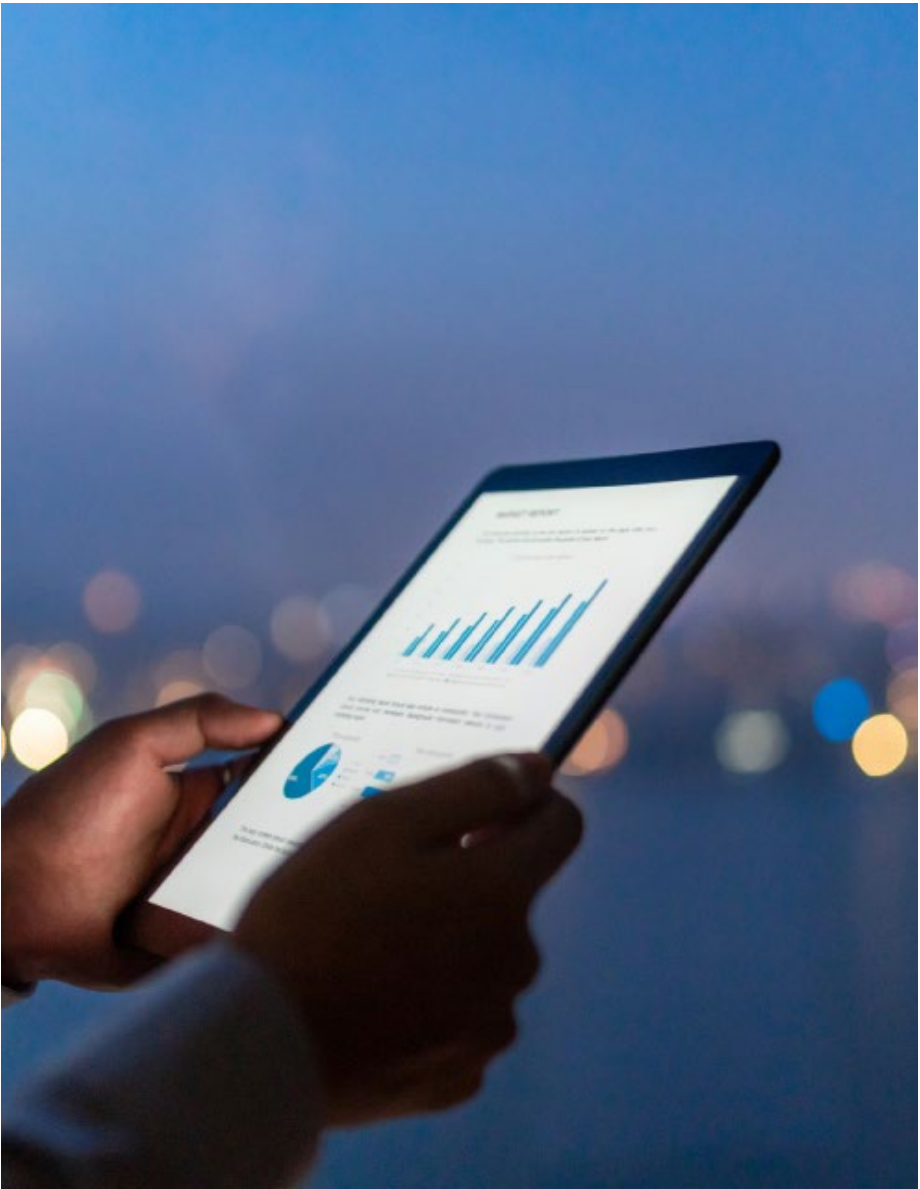
Business Technology Services

We solve for business challenges & support innovation through technology solutions.

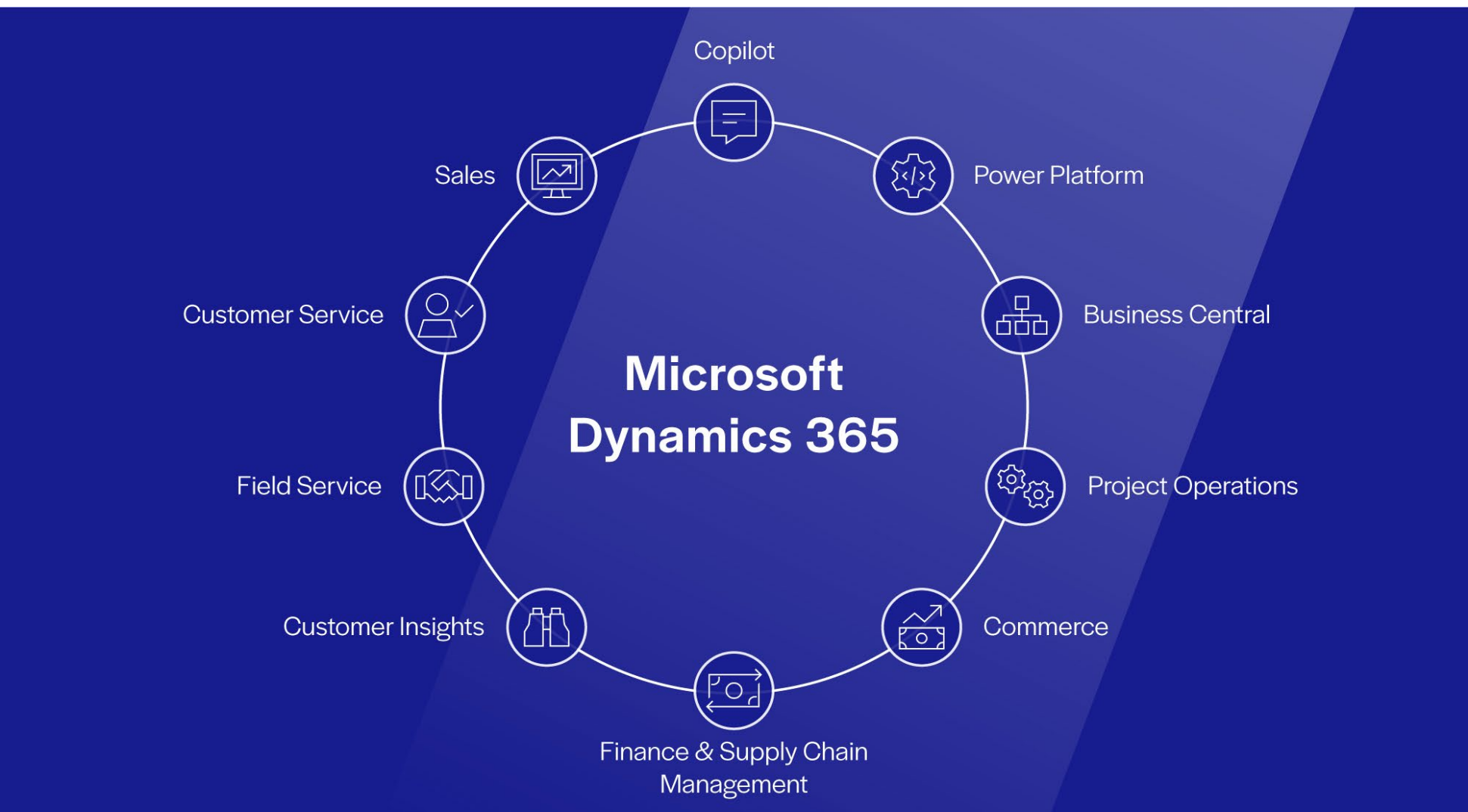
Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, & business intelligence (BI) tools.

Our end-to-end & managed service solutions help clients achieve their digital transformation goals. Services include:

- | | | | |
|--|--------------------------------------|---|--|
|  | Solution Assessment & Selection |  | Implementation Project Rescues |
|  | System Implementation & Integration |  | Business Intelligence (BI) & Analytics |
|  | Process & Technology Design |  | Robotic Process Automation (RPA) |
|  | Upgrades, Enhancements, & Automation |  | Custom Application Development |
|  | Training, Monitoring, & Support |  | IT & Cybersecurity Managed Services |



Forvis Mazars Microsoft Partnership



Today's Presenters



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Microsoft Dynamics CRM
Forvis Mazars



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Business Technology Services
Forvis Mazars

Agenda

1. What Is Microsoft Dynamics 365 CRM?
2. Five Pillars of Value
3. Common Pitfalls & How to Avoid Them
4. Q&A



01

What Is Dynamics 365 CRM?



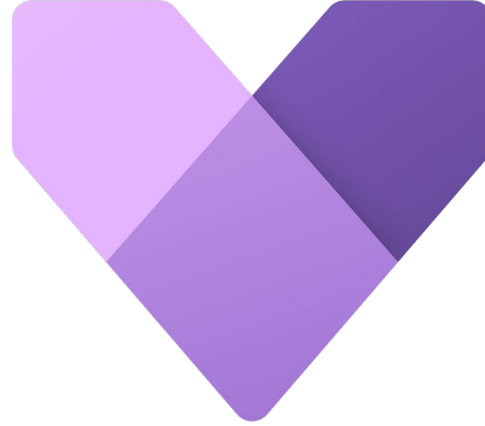
What Is Microsoft Dynamics 365 CRM?

Overview



Sales

The Dynamics 365 Sales application is designed to help sales teams work efficiently. One of the core ways it does this is by providing structured tools & workflows for managing Leads & Opportunities.



Customer Service

Dynamics 365 Customer Service aids in managing customer relationships by servicing tickets & other tasks.



& More!

Field Service is used to for tracking & managing resources being sent out to client sites.

Customer Insights is useful for marketing teams to track customer lifecycles.



Creating a New Record in Dynamics CRM Live Demo

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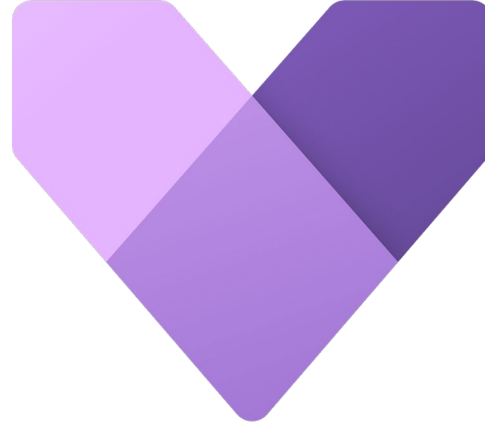
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02

Five Pillars of Value

- Automation
- Analytics
- Collaboration
- Scalability
- Security



Five Pillars of Value Automation

Benefits of Automation

- Reduces manual effort with automated tasks
- Sales: Lead qualification, opportunity progression
- Service: Case routing, follow-up tasks



Five Pillars of Value Analytics



Dashboards

Utilize out-of-the-box dashboards or build your own to help your teams see timely, relevant data.



Customer Insights

Dynamics has an entire modules for analyzing customer-related data. With Customer Insights – Journeys, you can map personalized customer journeys, while Customer Insights – Data enables you to unify data from multiple sources.



Power BI Integration

With native integrations to other Microsoft tools, Power BI can be connected to your Dynamics environment to build detailed visualizations for your decision makers.

Five Pillars of Value Collaboration

Collaboration is key for efficient teams.

Benefits

- Collaborate on records, tag colleagues
- Embed CRM data in chats, meetings
- Track activities & tasks, visibility to progress made
- File sharing makes finding documents easier

Integrations

- Native integration with Teams, Outlook, SharePoint





Collaboration Tools in Dynamics 365 Live Demo

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Five Pillars of Value Scalability



Start Small

Start with the Sales module & add on Marketing or Field Service as your company grows.



Microsoft Ecosystem

Connect to Microsoft applications like Azure, SharePoint, & Power BI.



Third-Party Apps

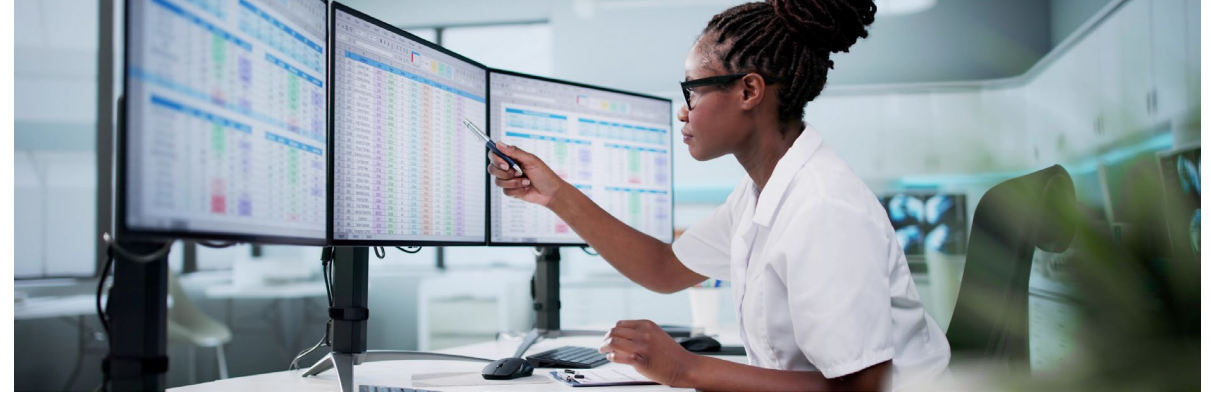
Microsoft Dataverse & custom APIs provide opportunities to connect with various systems across the web & with industry-specific applications.

Five Pillars of Value Security



Data Governance

- Role-based access, audit trails, GDPR, HIPAA compliance
- Data governance tools for integrity, privacy



Auditing Tools

- Configurable security roles, auditing tools
- Allow compliance officers to review changelogs of customer records

03

Common Pitfalls

... & How to Avoid Them



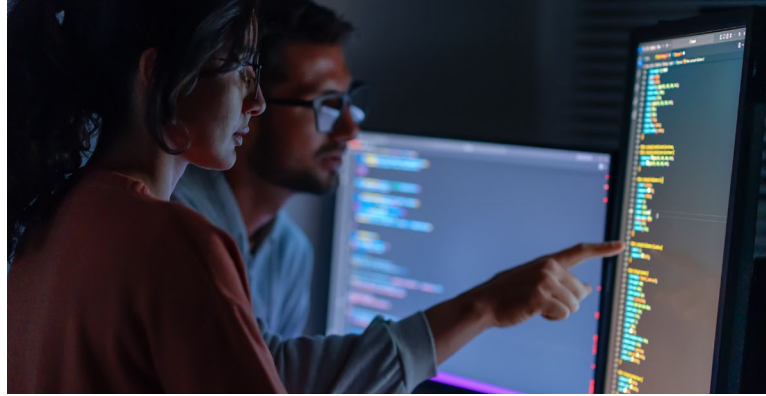
Common Pitfalls

How to Avoid Them



Low Adoption

- Invest in training, internal champions
- "Train the trainer" approach
- Increase adoption rates



Poor Data Quality

- Use validation rules, governance policies
- Built-in duplicate detection, automated data cleansing
- Standardized data entry with Business Process Flows



Over-Customization


- Align with business goals, maintain a clear road map
- Simplify forms for usability, performance
- Understand & establish success metrics

04

Q&A



Microsoft Dynamics 365 CRM Resources




Microsoft Dynamics 365 Customer Engagement 101 | Forvis Mazars

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Unlocking Business Growth Through Microsoft Innovation | Forvis Mazars

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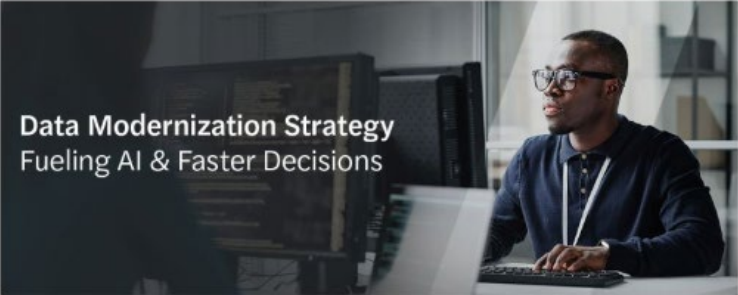
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Explore the strategy: <https://bit.ly/41OoWjD>





Data Modernization Strategy

Fueling AI & Faster Decisions





Power Automate:
Turning Outdated Into Automated


Thursday, October 30 • 10–11 a.m. ET



Beyond Integration
Unlocking Intelligent Automation

Wednesday, Nov. 19 • 10–11 a.m. ET






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10/29/2025

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Microsoft Dynamics 365 CRM

Final Thoughts – Ask Yourself ...

- What's your biggest challenge with revenue predictability right now?
- If your sellers could get back 10 hours per week, what would they focus on?
- How do you measure the return on your current sales technology investments?
- What keeps you up at night regarding your sales data & customer information?
- How well do you know your customers' preferences & buying patterns?
- How long does it take for new sellers to become fully productive?
- How much time do your sellers lose switching between tools?



Contact

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