

Forvis Mazars
Business Technology Services (BTS)

CRM for Growth

Turning Customer Relationships Into Revenue

October 28, 2026

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U.S. Presence

Leading U.S. Firm

$2.24B
Revenue (FY 2025)[1]

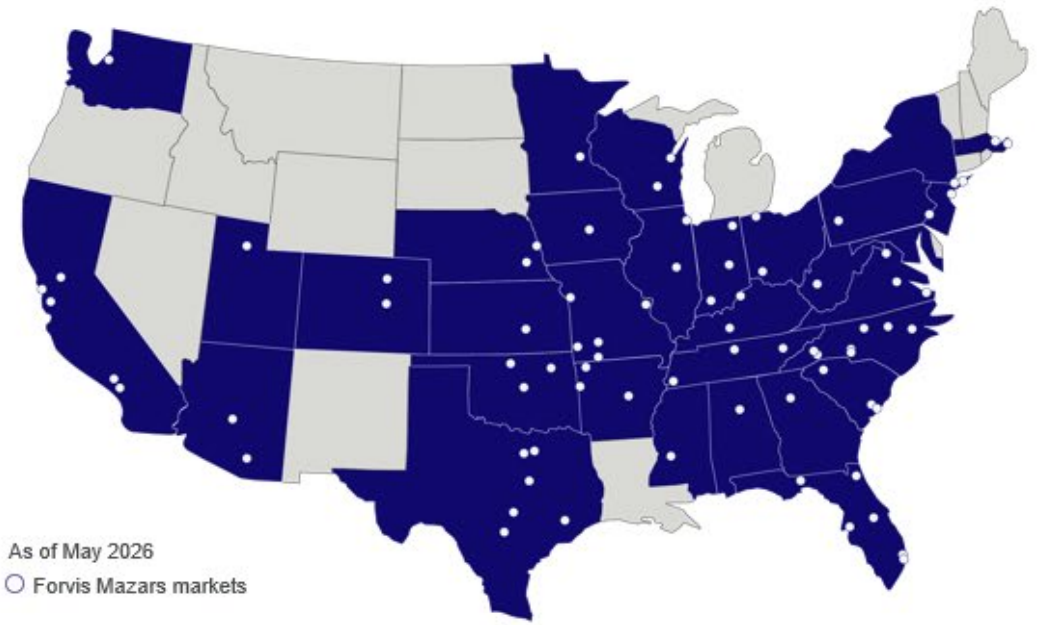
77
Markets

31
States

600+
Partners & Principals

7,000+
Employees

84 Net Promoter Score®[2]
("World-Class" Ranking)



As of May 2026
○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
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

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

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia-Metro Area
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

Washington D.C. Metro Area

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

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[1]FY 2025 revenue: period ending 5/31/25.
[2]FYE25 Relational Survey NPS results reflect responses from participating clients.
Updated 06/06/2026

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Business Technology Services

Implementing partnerships to propel efficiency and competitive advantage.

Business Technology Services at Forvis Mazars supports your organization with enterprise resource planning, customer relationship management, advanced technology, and managed service solutions. Driven by industry experience and deep process knowledge, we assist organizations through strategic projects, management consulting, co-sourcing arrangements, and managed services — modernizing the platforms, tools, and governance practices that help move your business forward. For nearly three decades we have implemented large-scale digital transformation for multinational, regional, and local organizations. We roll our sleeves up and work alongside you throughout the journey. That is our Unmatched Client Experience®.

SERVICES INCLUDE



Solution Assessment and Selection



Process and Technology Design



System Implementation and Integration



Upgrades, Enhancements, & Automation



Training, Monitoring, & Support



Implementation Project Rescues



Business Intelligence (BI) & Analytics



Robotic Process Automation (RPA)



Custom Application Development



Business Application Managed Services

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Forvis Mazars Across the Full Dynamics 365 Stack

One partner across the full Dynamics 365 stack for strategy and roadmap, implementation, data migration, and managed support.

Finance
Automated core financials, planning, and compliance reporting.

Supply Chain Management
Demand planning, sourcing, manufacturing, and inventory visibility.

Business Central
All-in-one ERP for mid-market finance, operations, and sales.

Sales
Pipeline, forecasting and relationship insight for revenue teams.

Customer Service
Omnichannel case management with agent and self-service AI.

Field Service
Scheduling, dispatch and mobile work-order execution.

Customer Insights
Unified customer profiles and orchestrated marketing journeys.

Project Operations
Quote-to-cash for project delivery, resourcing and billing.

Commerce
Connected digital, in-store and back-office retail experiences.

Extended by Power Platform, Azure, and Copilot — low-code apps, automation, integration, and AI agents built on a single, governed data foundation.

Microsoft Partner

Microsoft Dynamics 365

Microsoft Power Platform

Microsoft Azure

Microsoft Solutions Partner
Modern Work

Microsoft Solutions Partner
Business Applications

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Today’s Presenters



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Kevin Beale

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THE ADVANCENET EXPERIENCE

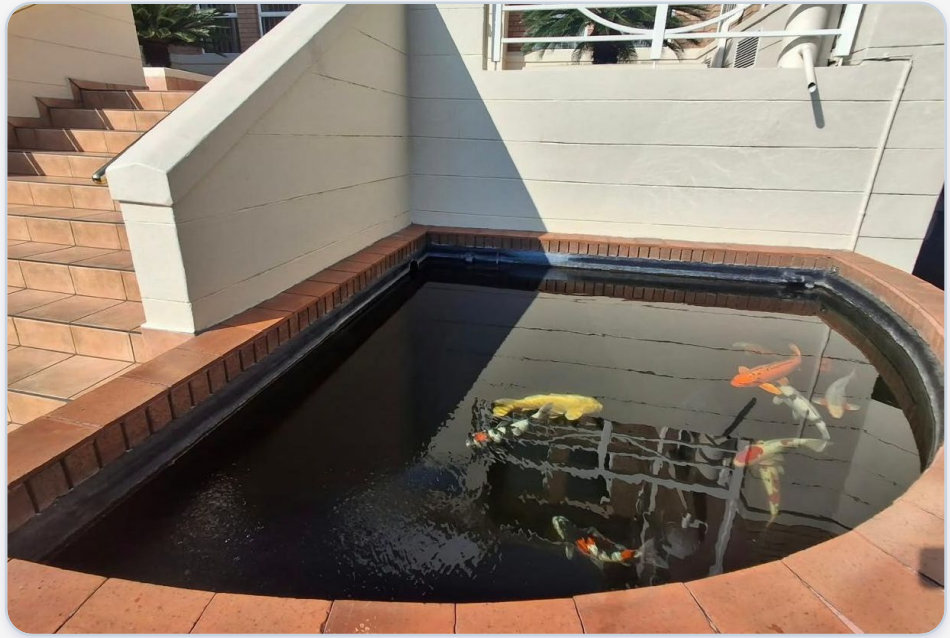
The customer experience began before the meeting did.

Recognized. Welcomed. Prepared for. Remembered.

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The experience began before the meeting did.





Recognized. Welcomed. Expected.







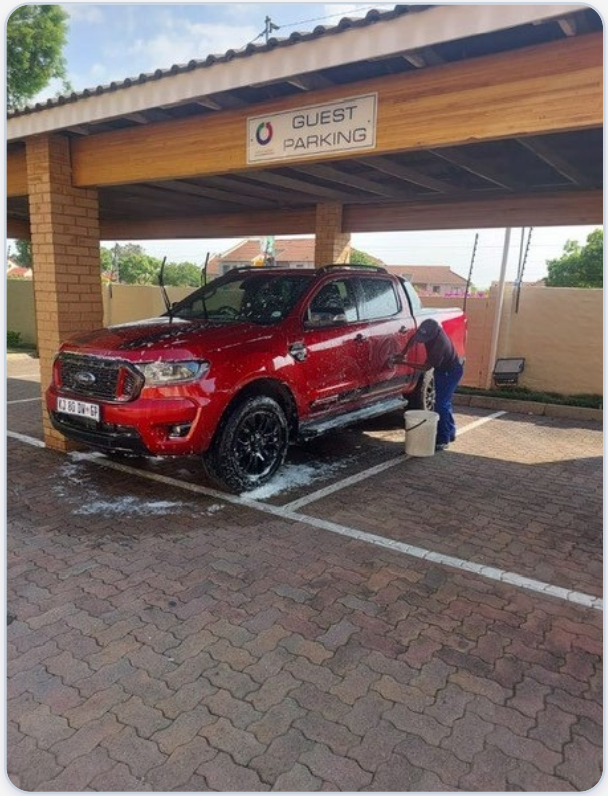
The team was prepared before the customer entered the room.





The experience continued while the meeting was happening.

Even the customer's car was cared for.





CRM Helped Me Run My Little Business

ONE DASHBOARD CONNECTED RELATIONSHIPS, PRIORITIES, AND COMMERCIAL RESPONSIBILITIES

My daily CRM command center: the portals I worked from throughout the day

Relationships

Sarah Mitchell | Northgate Supplies

sarah.mitchell@northgate.example

Relationship history: 12 interactions

Meetings & notes

TUE 14 **Quarterly review 10:00**

Context: renewal and support scope

Follow-up

Thank-you letter — Sent

Proposal recap — Due 18 Mar

Next step: confirm delivery dates

My priorities

- [x] Call Sarah before renewal
- [x] Send meeting notes
- [ ] Review overdue invoice

Billing & credit control

Invoiced	**R 148 500**
Outstanding	**R 32 000**
Credit status	Follow-up required

Opportunities

Qualify | Propose | Negotiate | Close

Active: support renewal R 96 000

Customer history: 3 years, 2 renewals

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Everyone touched the customer experience

Different roles. One connected relationship.



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CRM did not sit off to the side as a sales database. It helped coordinate the business around the customer.

TRUST BEFORE TECHNOLOGY

CRM supported the experience. People created the relationship.

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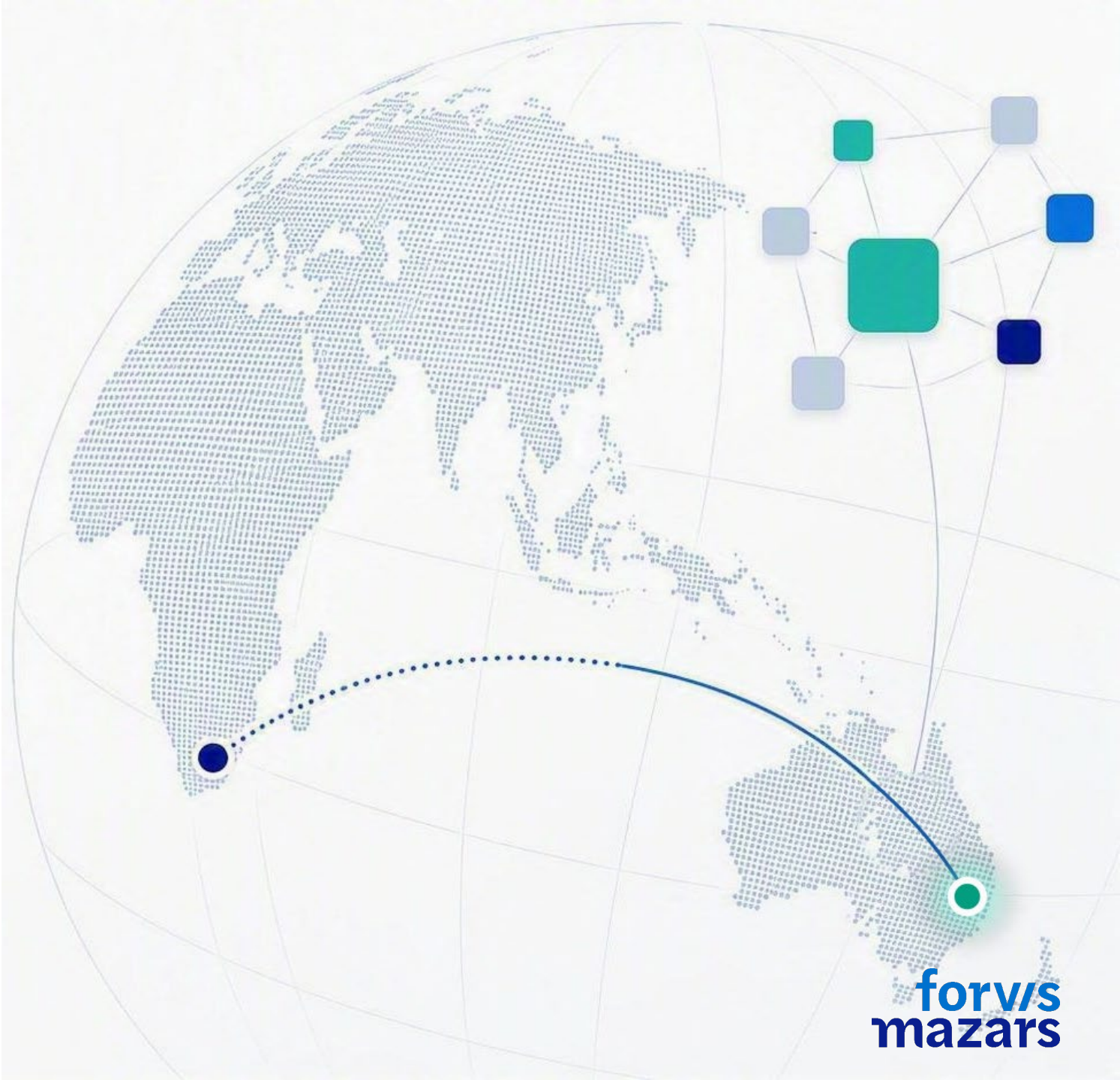
Then I moved to Australia

A GLOBAL ORGANIZATION.
A VERY DIFFERENT DAY-TO-DAY EXPERIENCE.

- I arrived having experienced a deeply connected way of managing customer relationships.

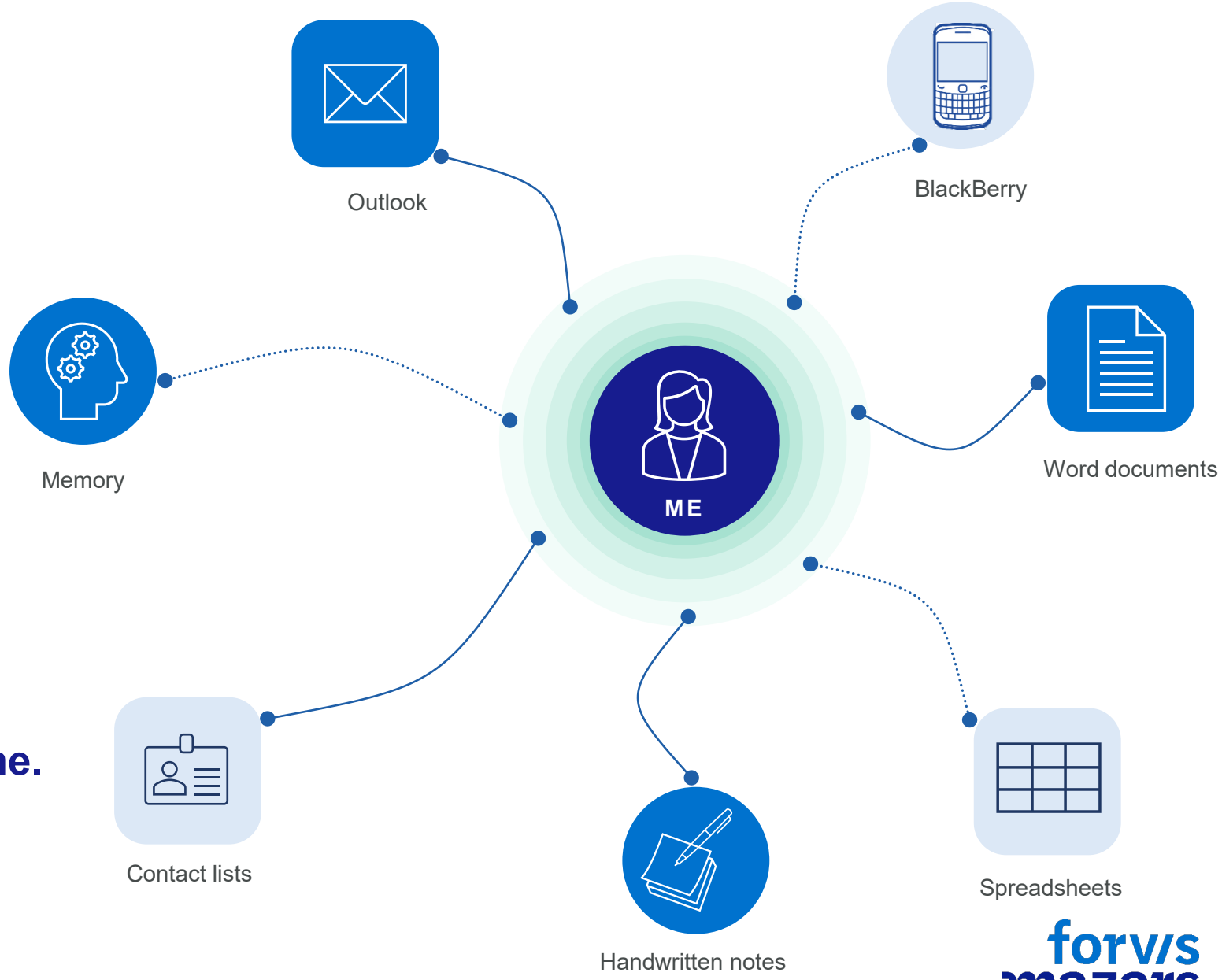
- But I did not have that same practical CRM experience available to me.

So, I built my own.



My makeshift system

I CONNECTED THE WORK MYSELF.



The information existed.
The connection depended on me.

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THE WORKAROUND IS A SIGNAL

When the organization does not connect the information, employees connect it themselves.

Spreadsheets • Inbox folders • Personal notes • Contact lists • OneNote • Memory

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Why this story matters to the work we do today

From individual workarounds to a connected way of working.

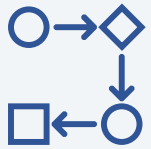
1



Customer relationships

Shared context across the customer journey

2



Business processes

Clearer handoffs and consistent follow-through

3



Data and reporting

Information people can trust and act on

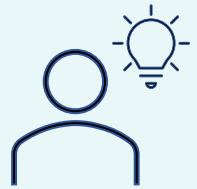
4



Technology and automation

Systems that move the work forward

5



People and decisions

Visibility for employees and leadership

Strategy and selection • Design • Implementation • Integration • Training • Support

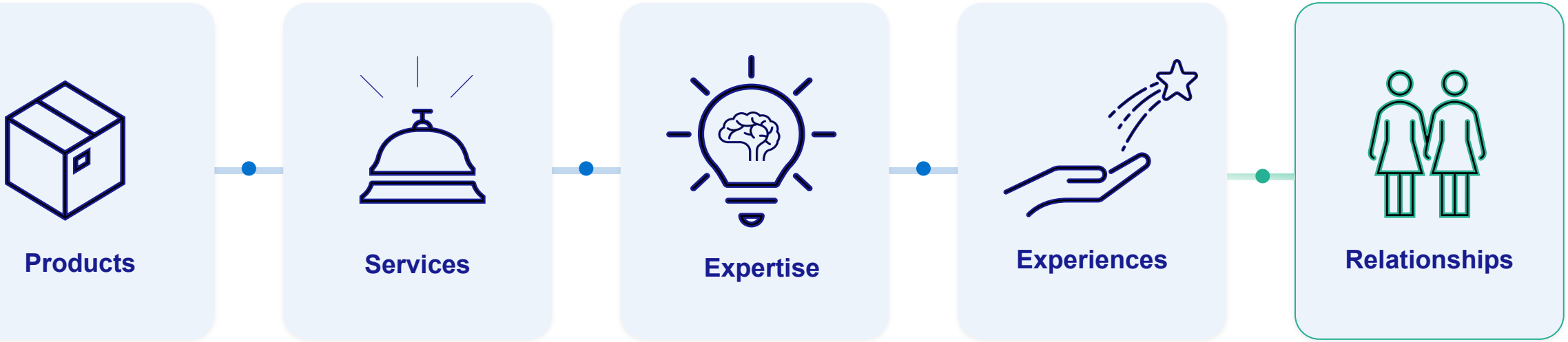
The goal is not simply to install technology.
It is to **connect the work that drives customer relationships and growth.**

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What is your business?

WHAT DO YOU SELL?

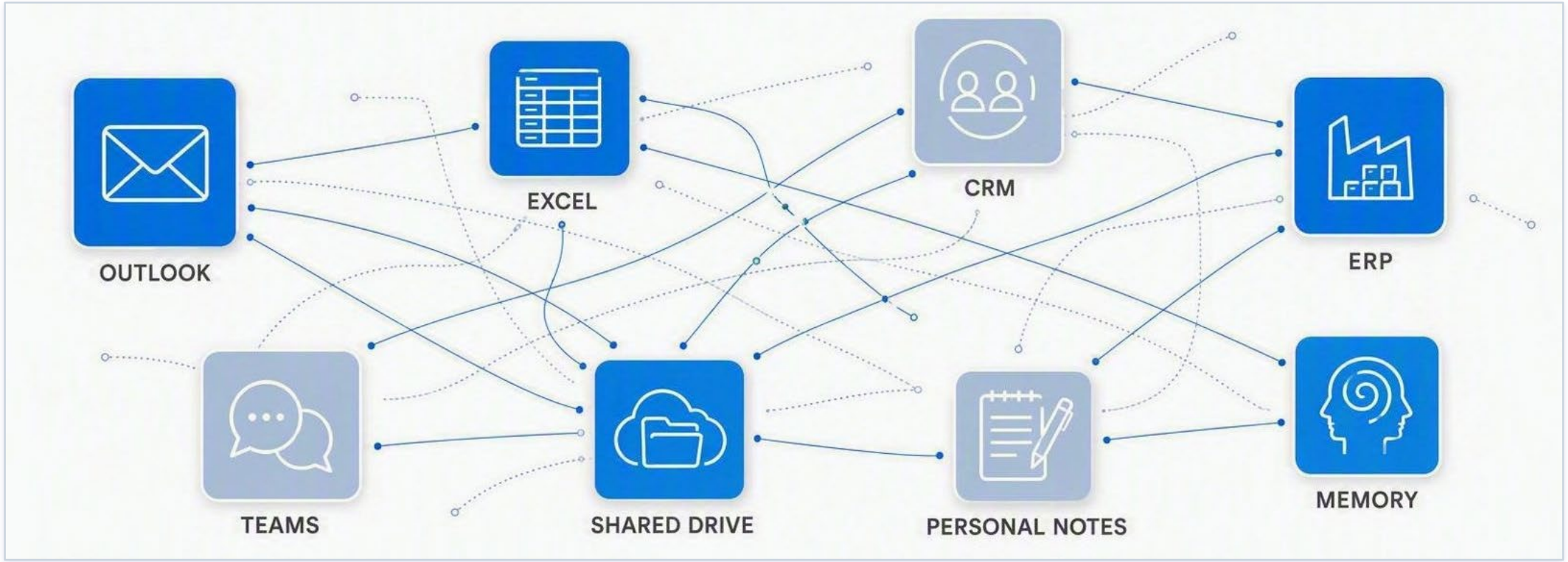


Is the organization connecting the work,
or is each employee connecting it for themselves?

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Where the work actually happens

NOT IN A SYSTEM. IN BETWEEN THEM.



Everyone is working hard. Nobody can see the whole thing.

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Meet Printing Company ABC

ONE CUSTOMER. MANY SIGNALS. NO COMPLETE STORY



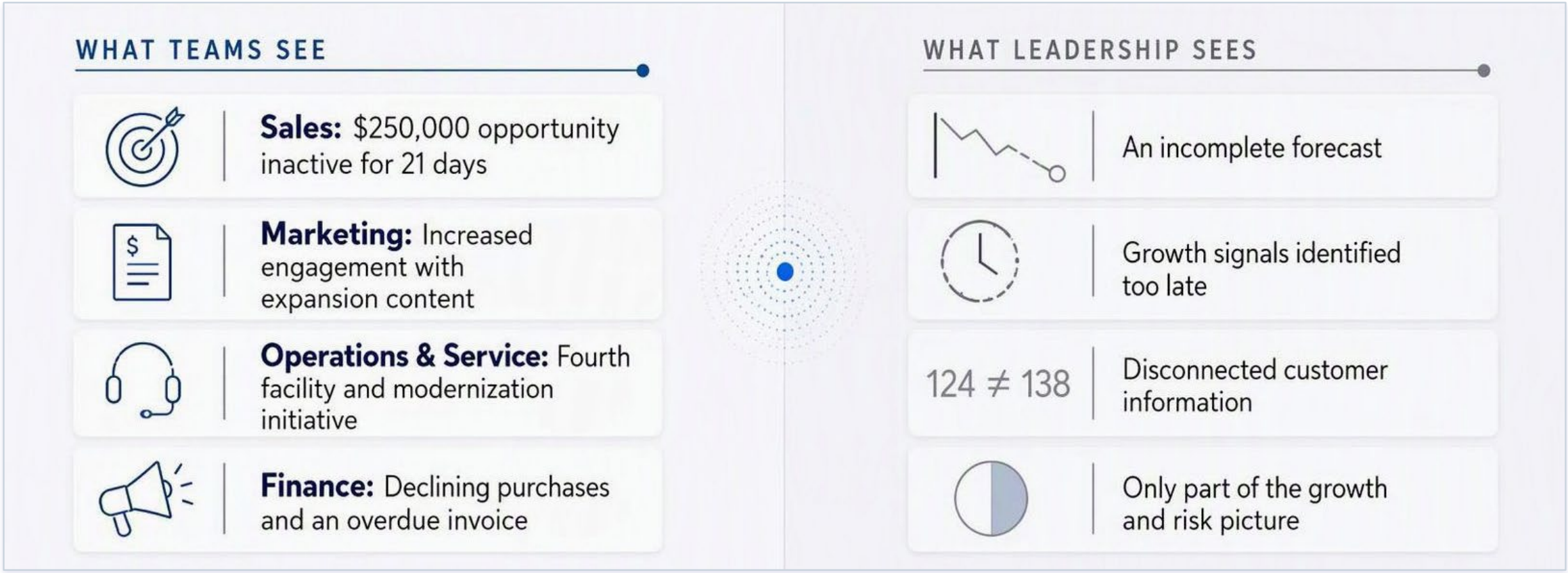
No single person can see the complete story.

Working example: fictional customer for the demo narrative

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One customer. Many perspectives.

EVERYONE KNOWS SOMETHING. NO ONE KNOWS EVERYTHING.

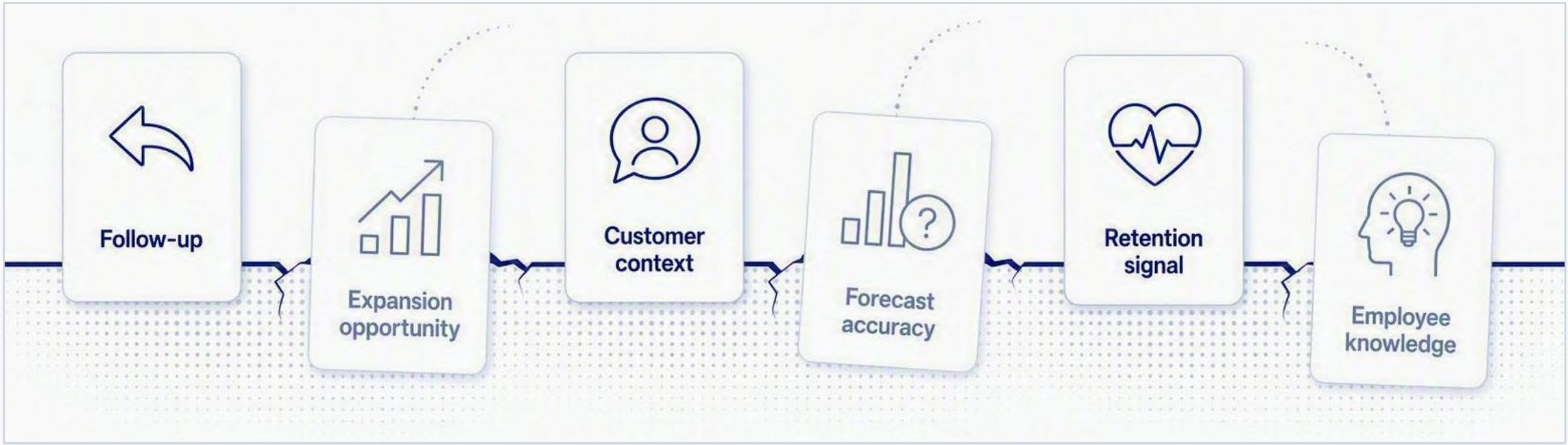


Each team is acting on a different version of the same customer.

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What falls through the cracks?

FRAGMENTATION TURNS ORDINARY WORK INTO BUSINESS RISK.



The cost is bigger than lost time.

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THE TURNING POINT

What if the business could see the whole story?

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A SYSTEM OF WORK

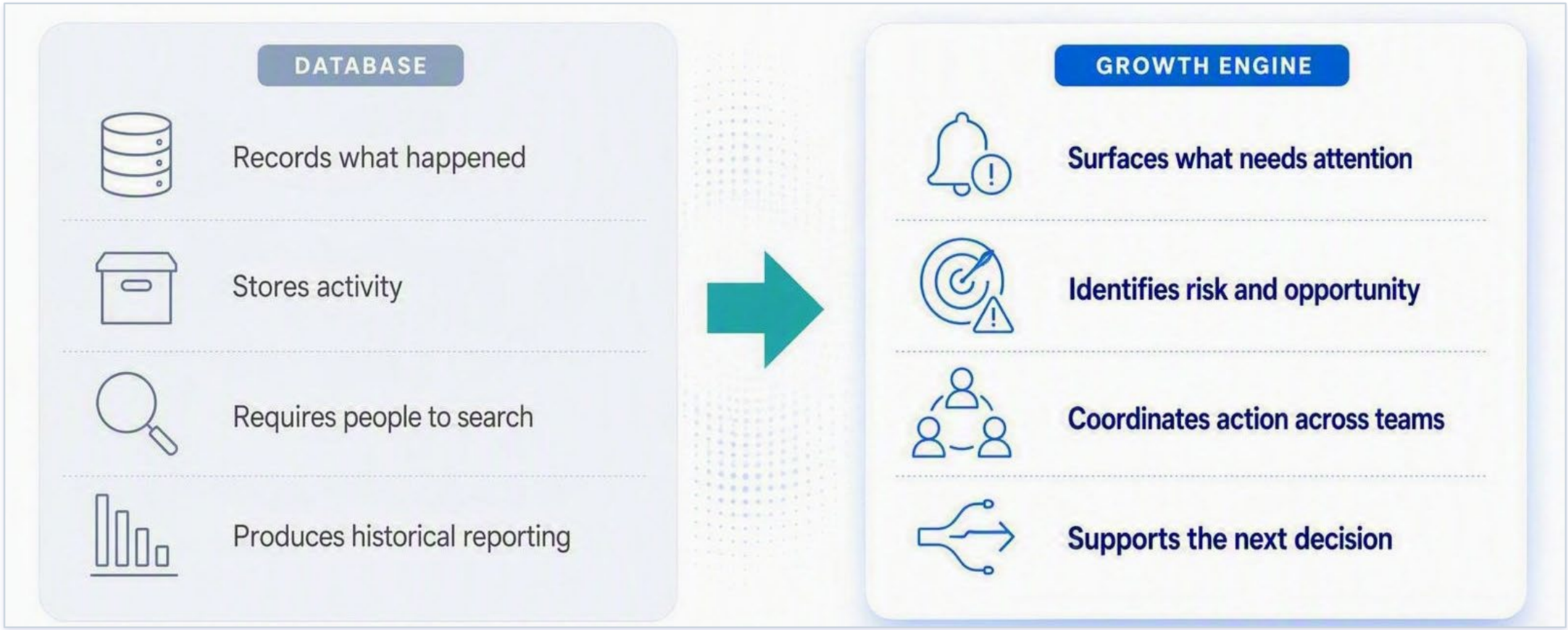
CRM should not create more work. It should help people do their work.

People + Process + Data + Technology

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From a database to a growth engine

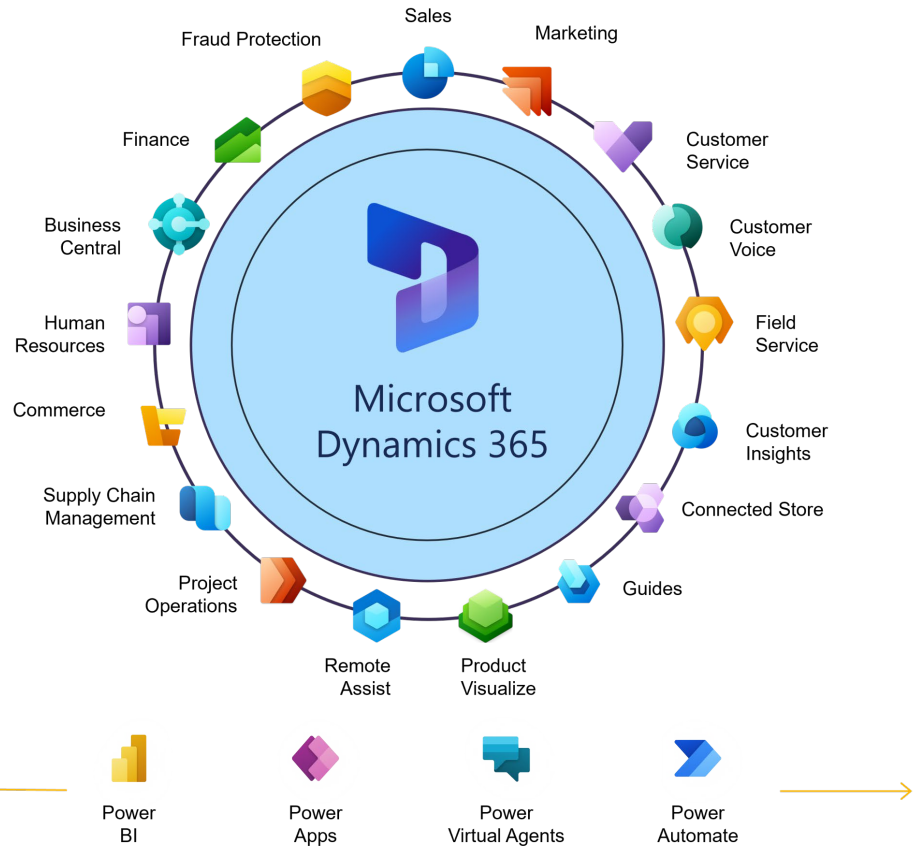
THE DIFFERENCE IS NOT WHAT YOU STORE. IT IS WHAT THE ORGANIZATION CAN DO NEXT.



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Bringing the customer story together

MICROSOFT DYNAMICS 365 CUSTOMER ENGAGEMENT



\+

Copilot

\+

Microsoft 365 and Power Platform

Dynamics 365 Customer Engagement connects customer relationships, activities, opportunities, and service.

Microsoft 365, connected business data, Power Platform, analytics, and Copilot extend that foundation through collaboration, automation, insight, and action.

Connect the relationship • Support the work • Turn insight into action

Illustrative future state enabled through Dynamics 365, connected data, Microsoft 365, Power Platform, and Copilot.

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GUIDED DEMONSTRATION

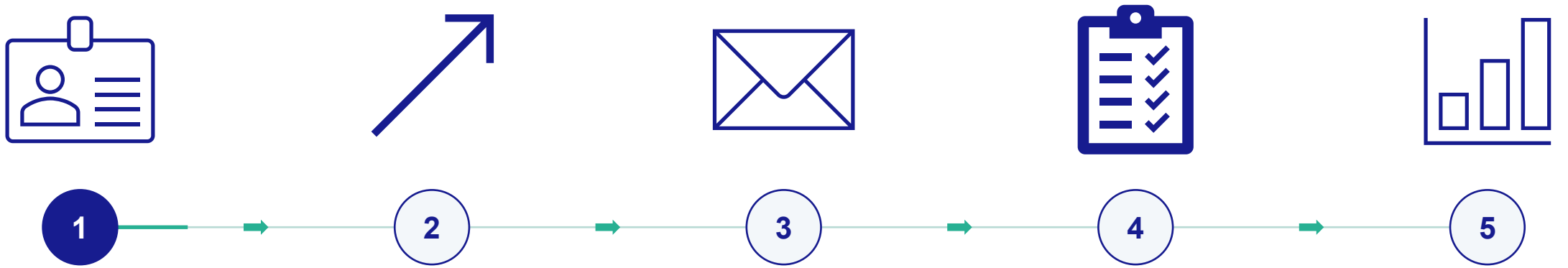
Watch the customer story move from information to action.

Understand the relationship • Recognize opportunity • Identify risk • Coordinate action • See the business

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Demo journey

SHOW THE CUSTOMER JOURNEY, NOT A SOFTWARE TOUR.

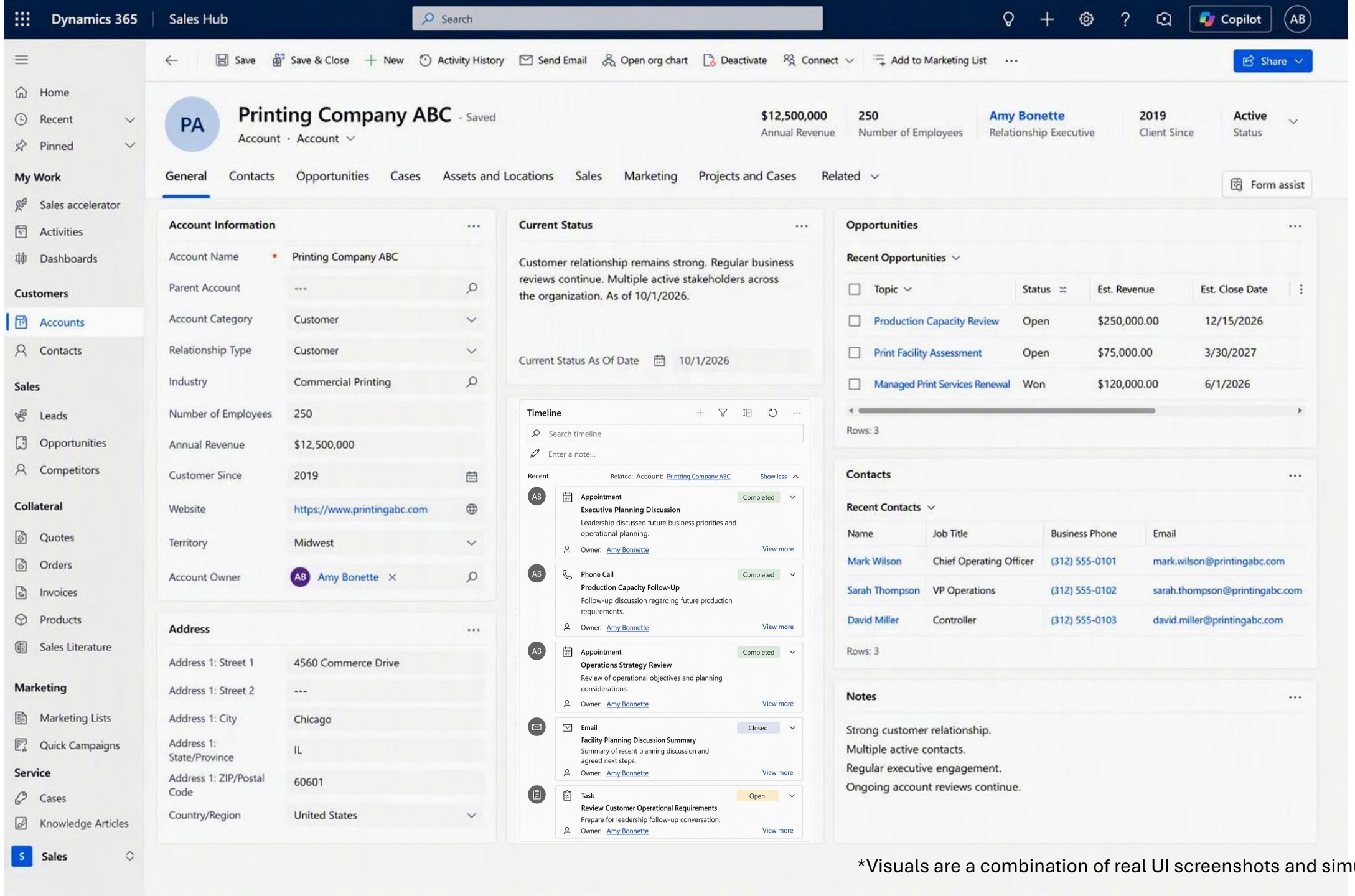


1. **Understand the relationship**
2. **Recognize opportunity**
3. **Identify risk**
4. **Coordinate action**
5. **See the business**

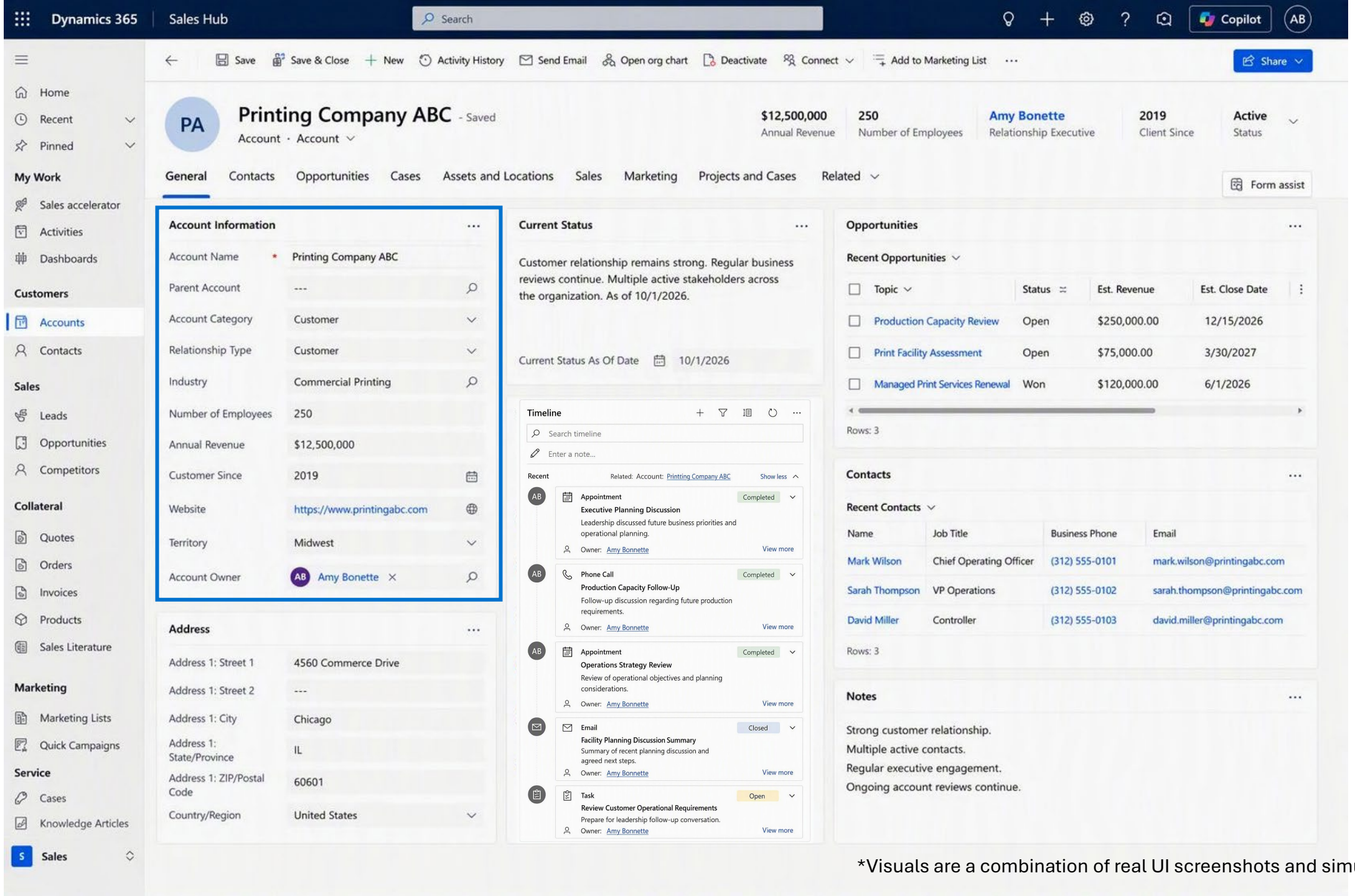
ONE CUSTOMER STORY • FIVE BUSINESS OUTCOMES

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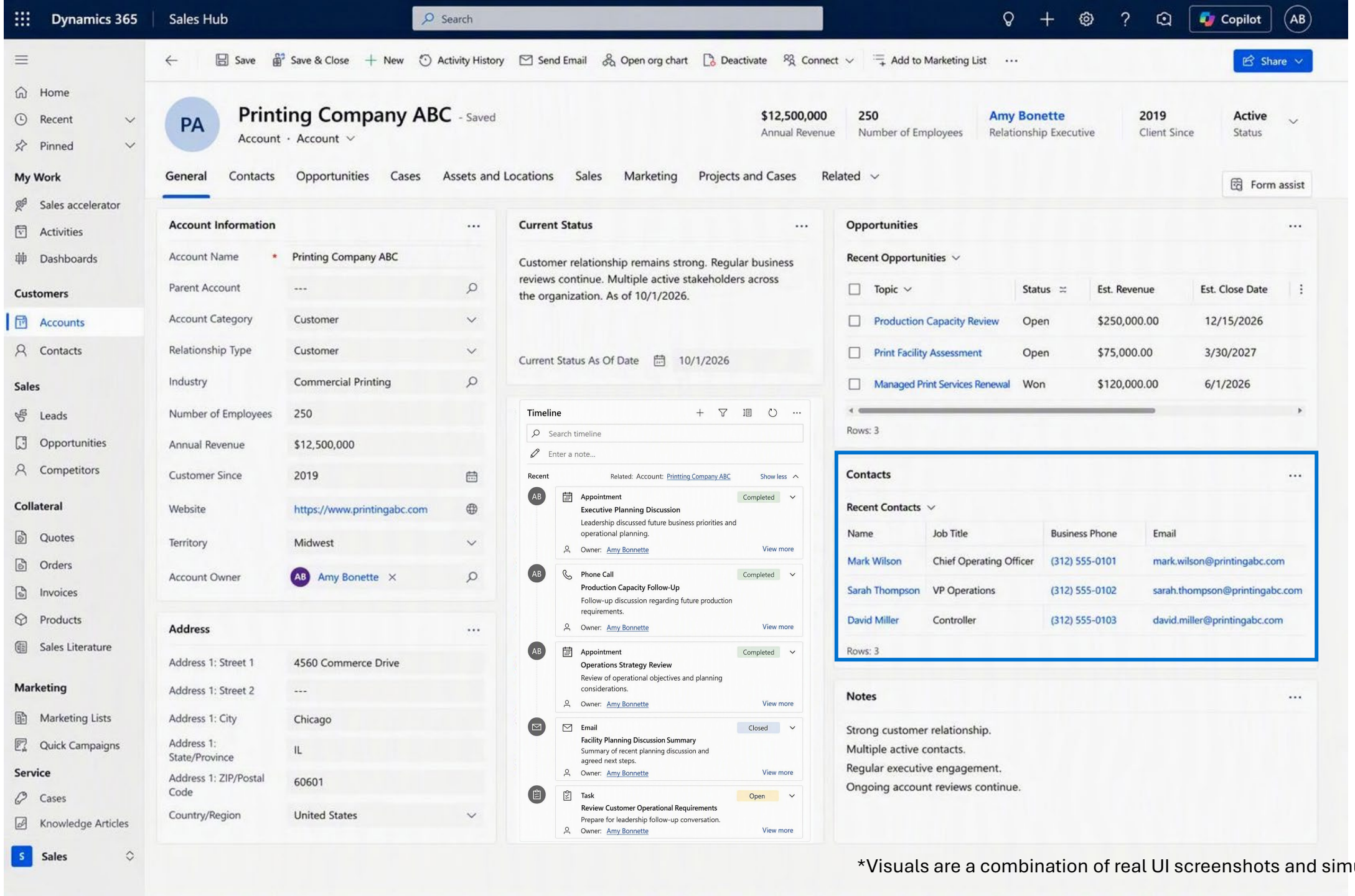
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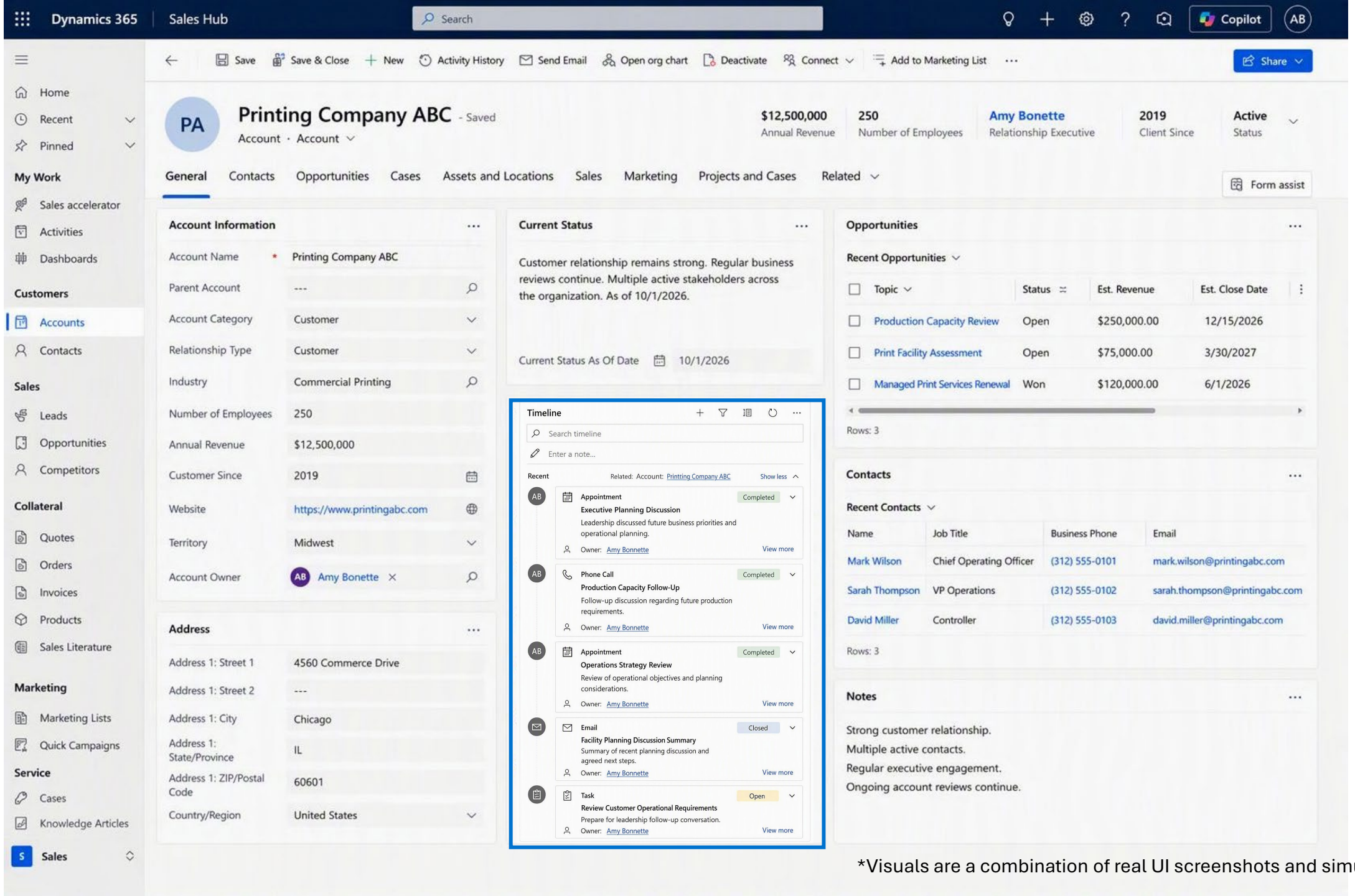
*Visuals are a combination of real UI screenshots and simulated data



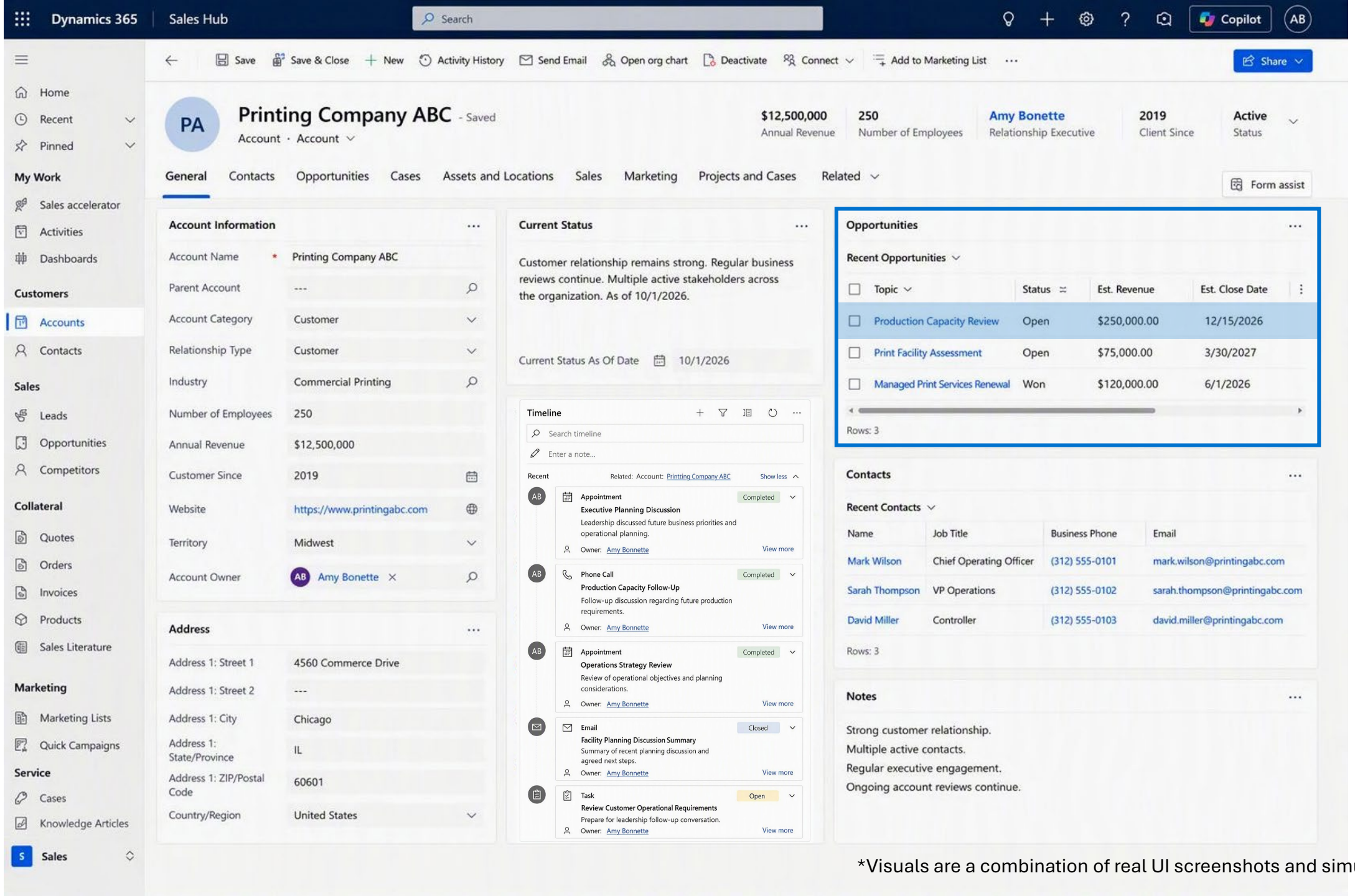
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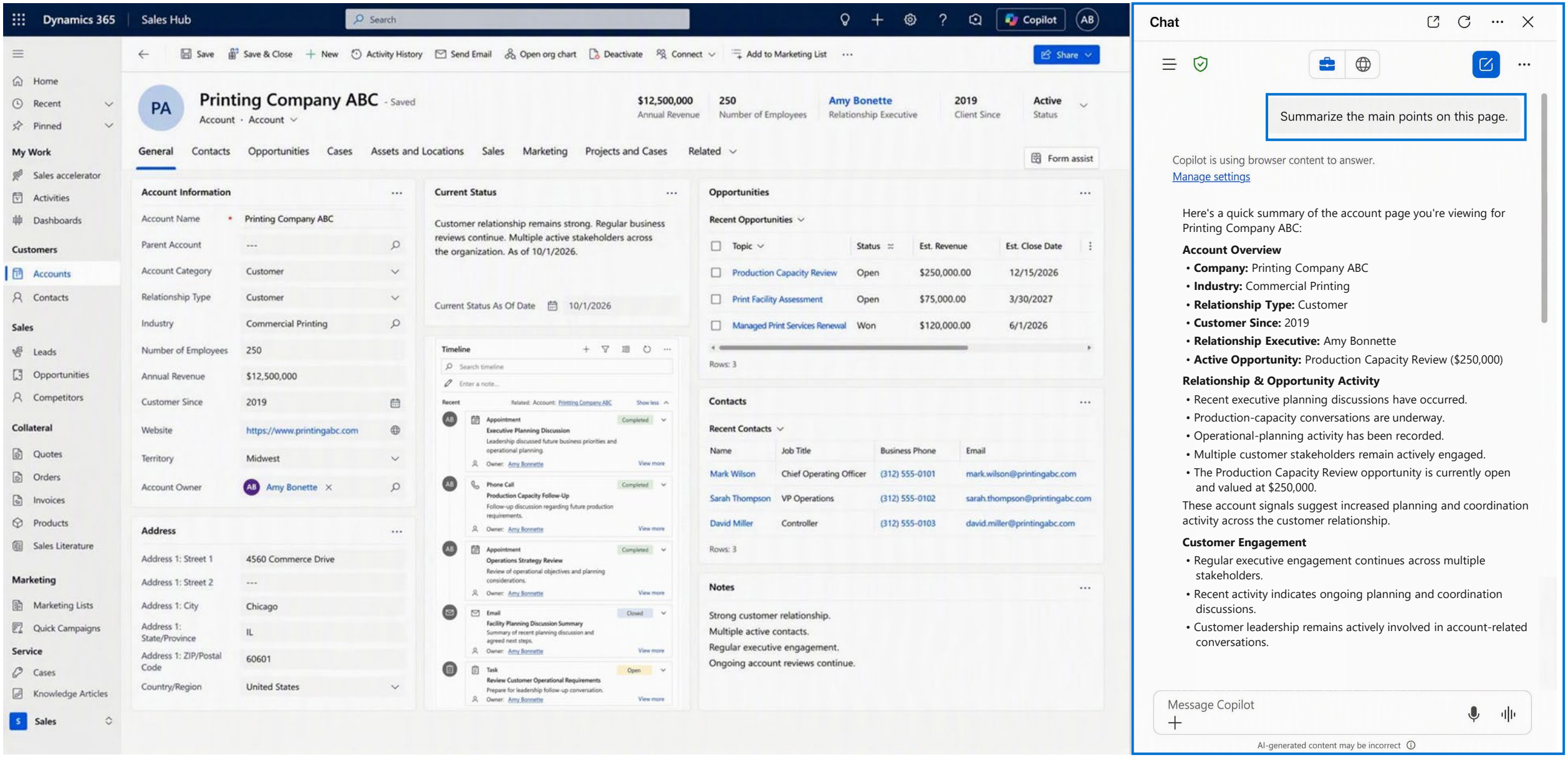
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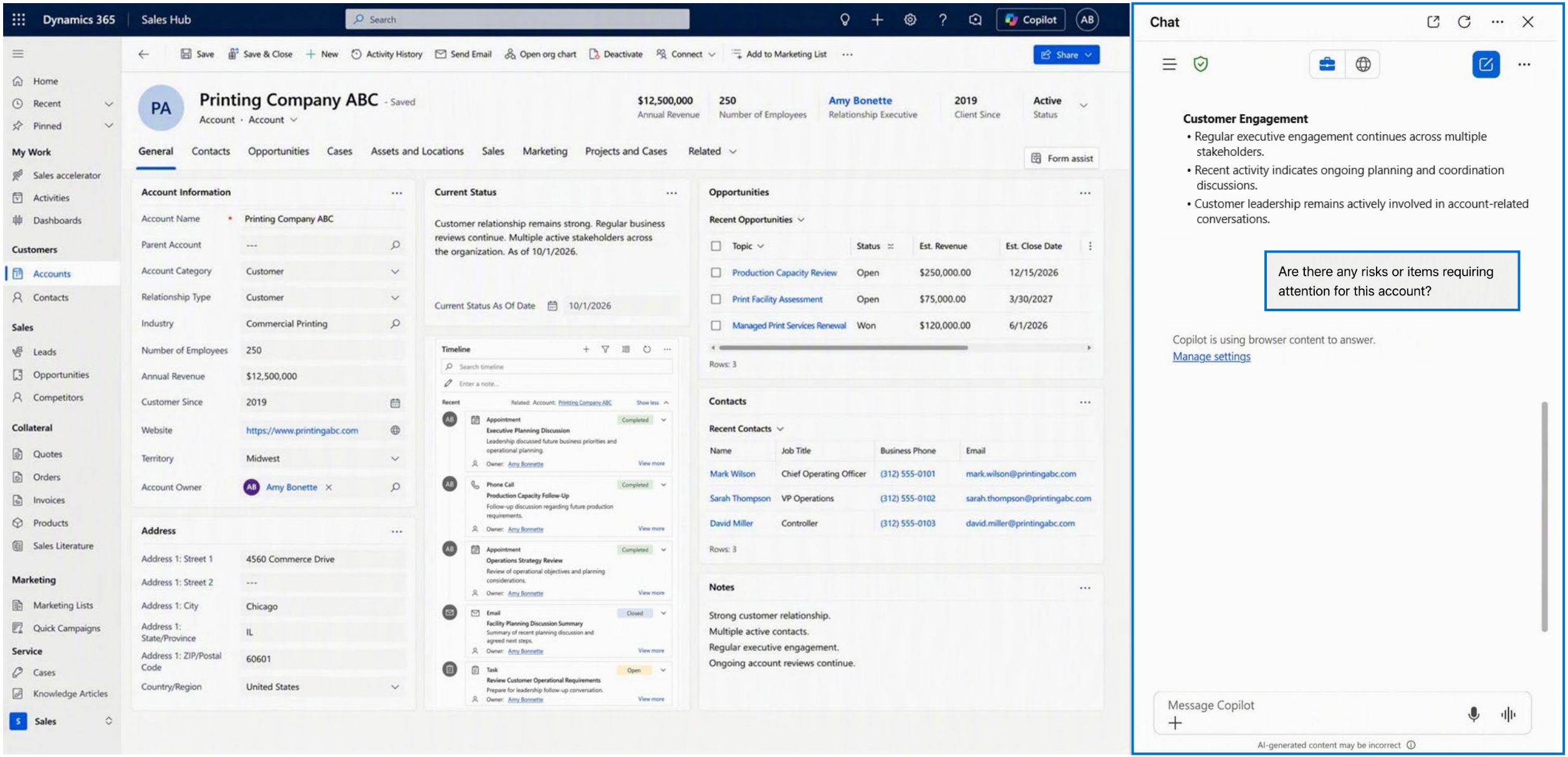
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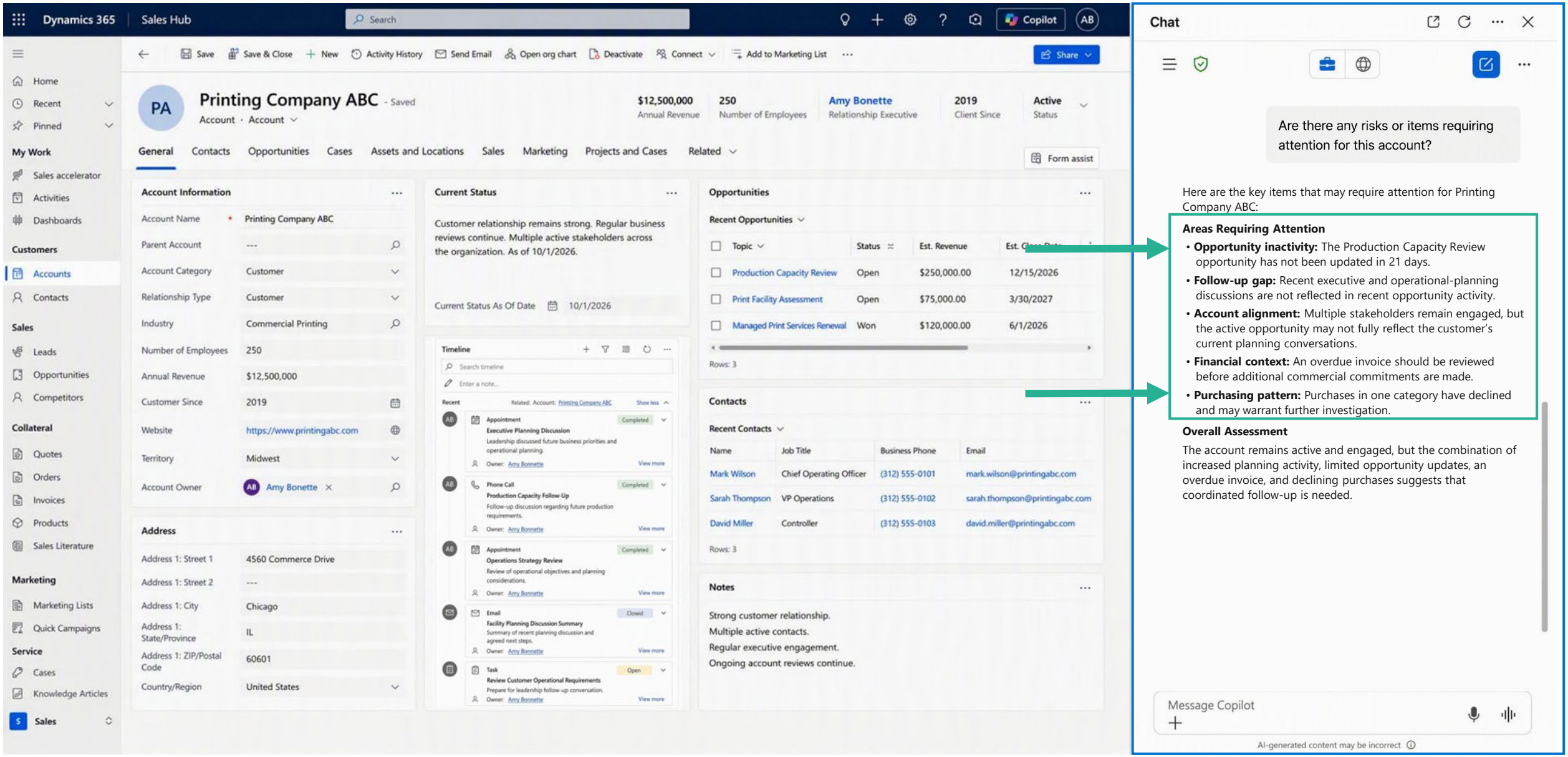
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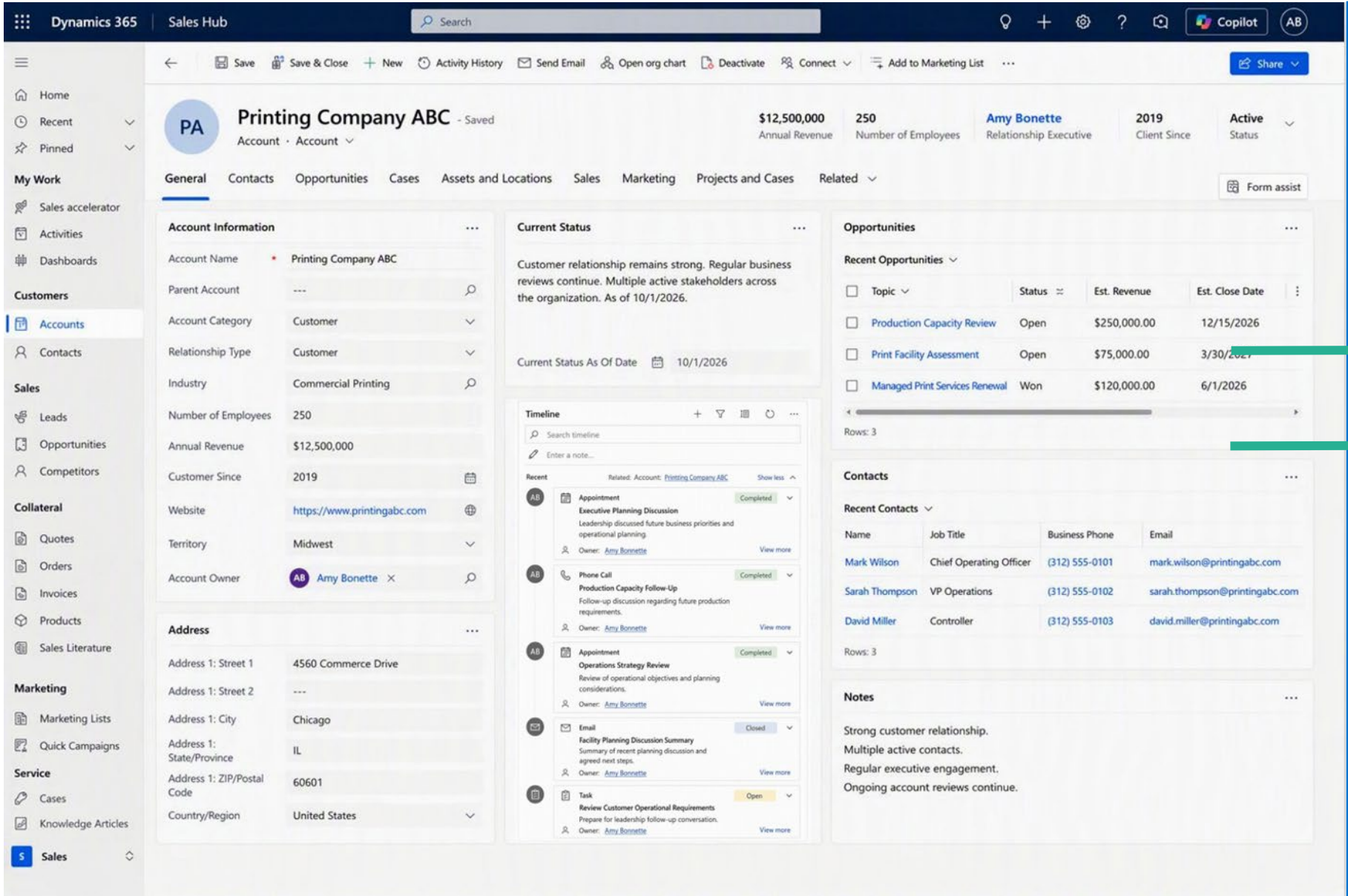
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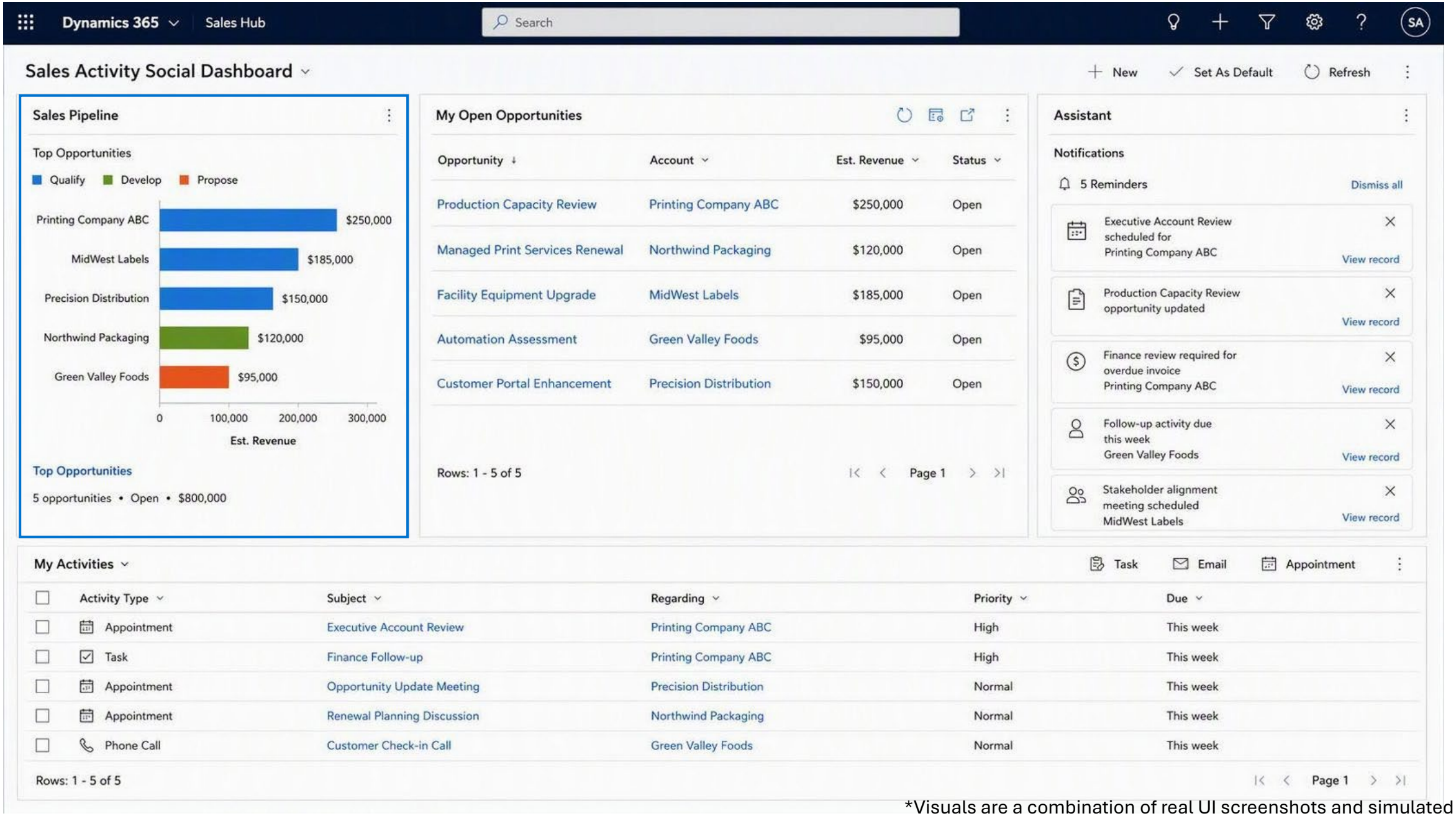
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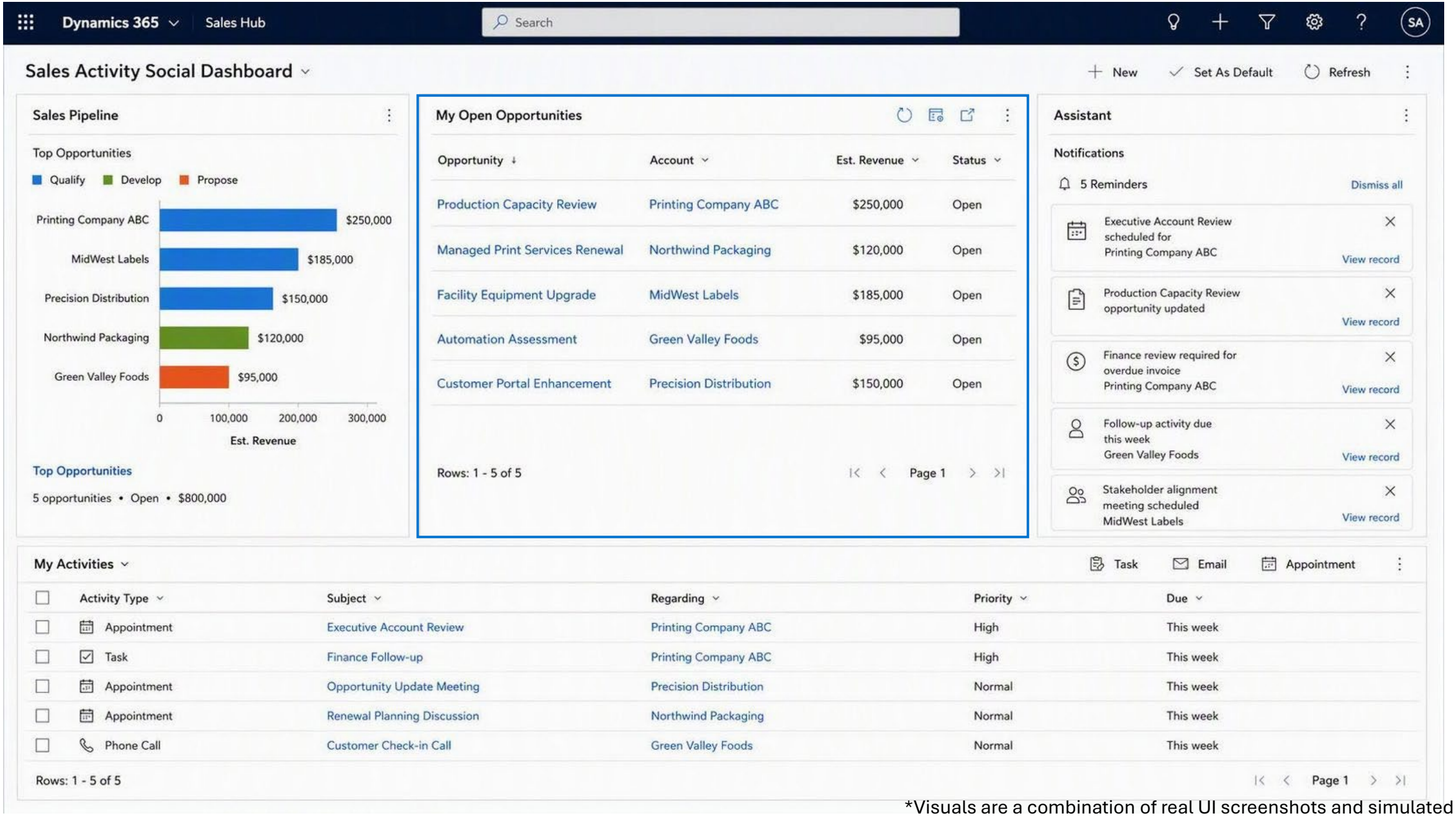
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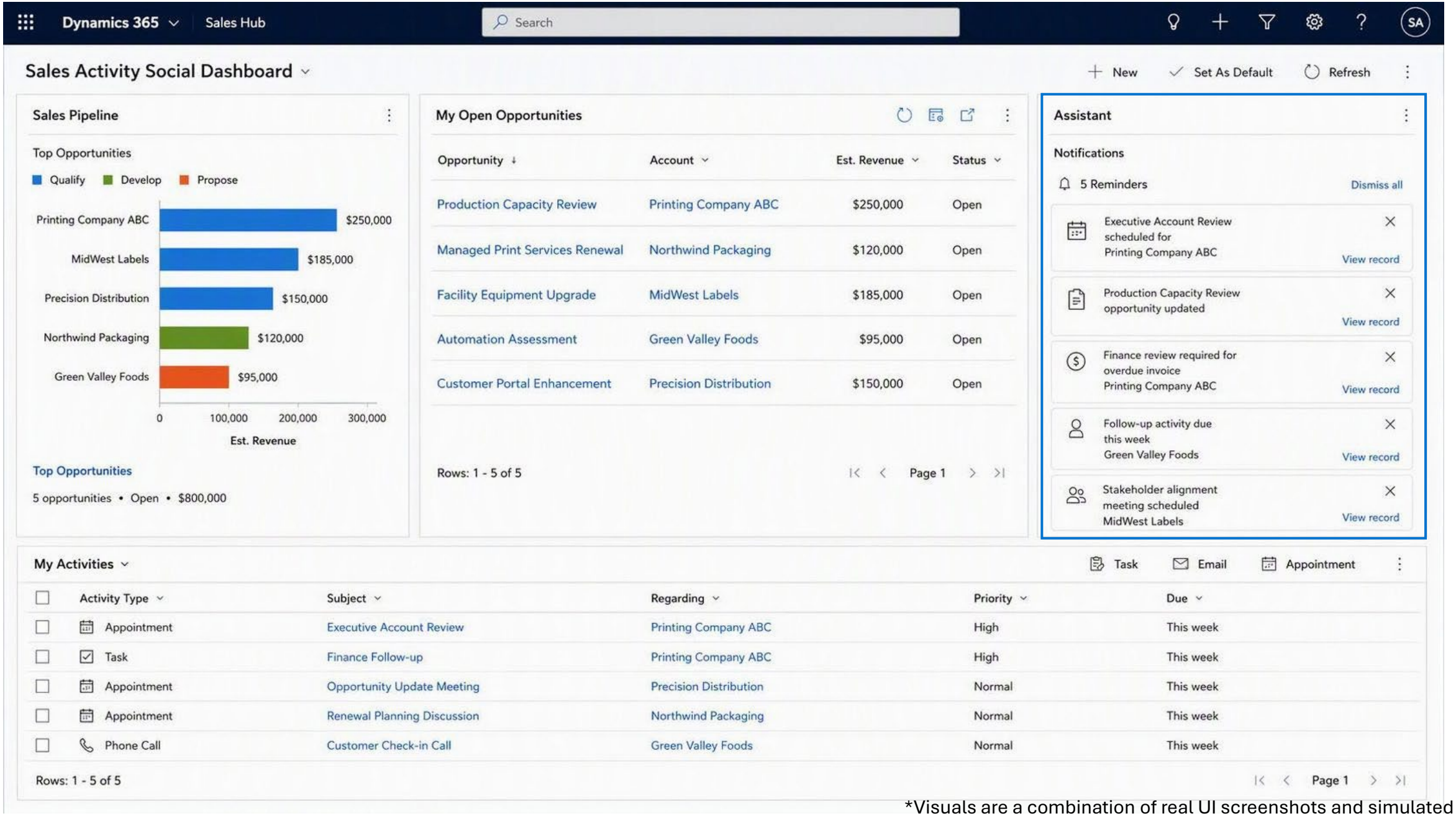
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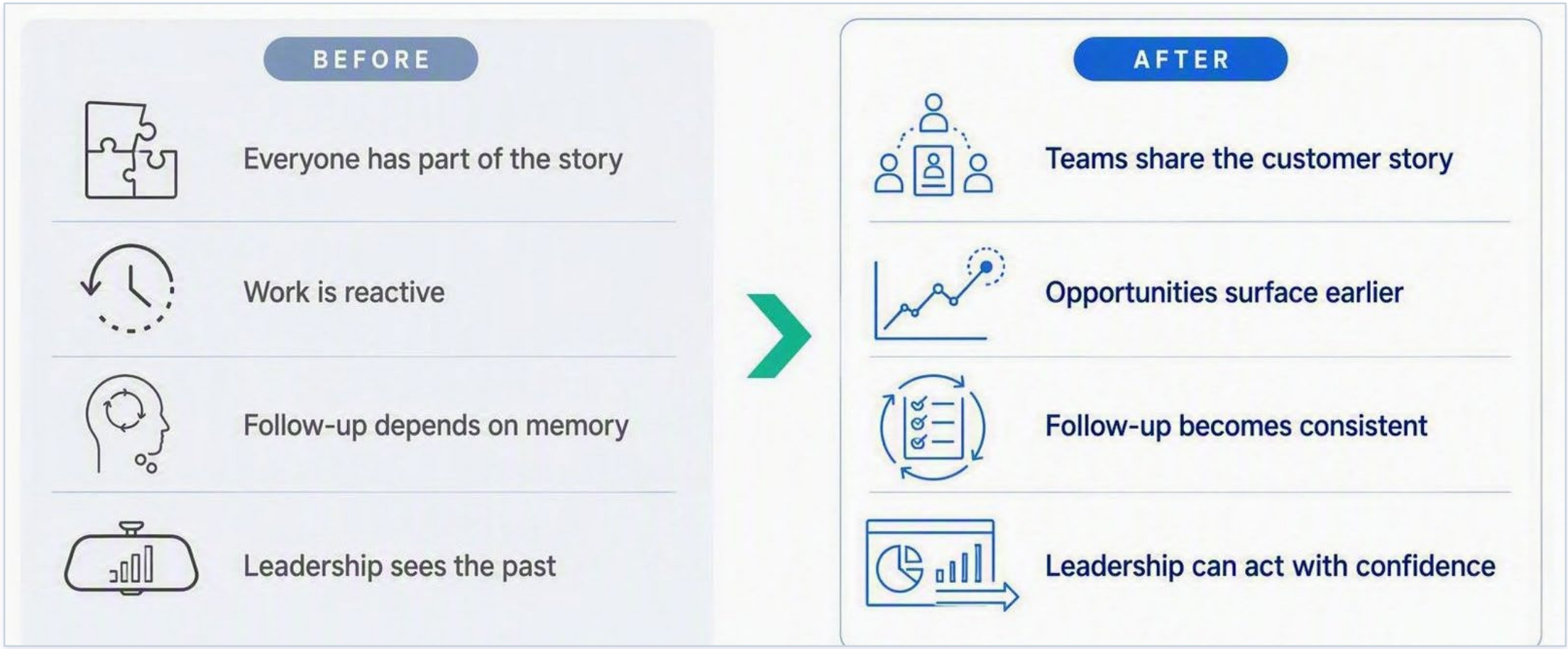
*Visuals are a combination of real UI screenshots and simulated data



*Visuals are a combination of real UI screenshots and simulated data

What changes when CRM works

THE same CUSTOMER. A VERY DIFFERENT OPERATING EXPERIENCE.



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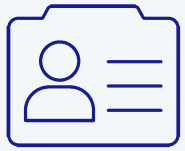
FOUNDATION BEFORE INTELLIGENCE

AI cannot create a reliable customer strategy from unreliable customer data.

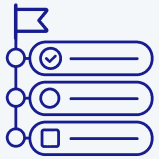
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Where AI actually helps

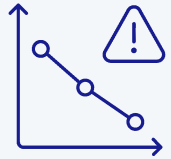
PRACTICAL ASSISTANCE, GUIDED BY RELIABLE BUSINESS CONTEXT.



Summarize the relationship



Prioritize follow-up



Surface declining engagement



Support account research



Identify patterns and signals



Prepare for customer conversations



HUMAN JUDGMENT STAYS IN THE LOOP.

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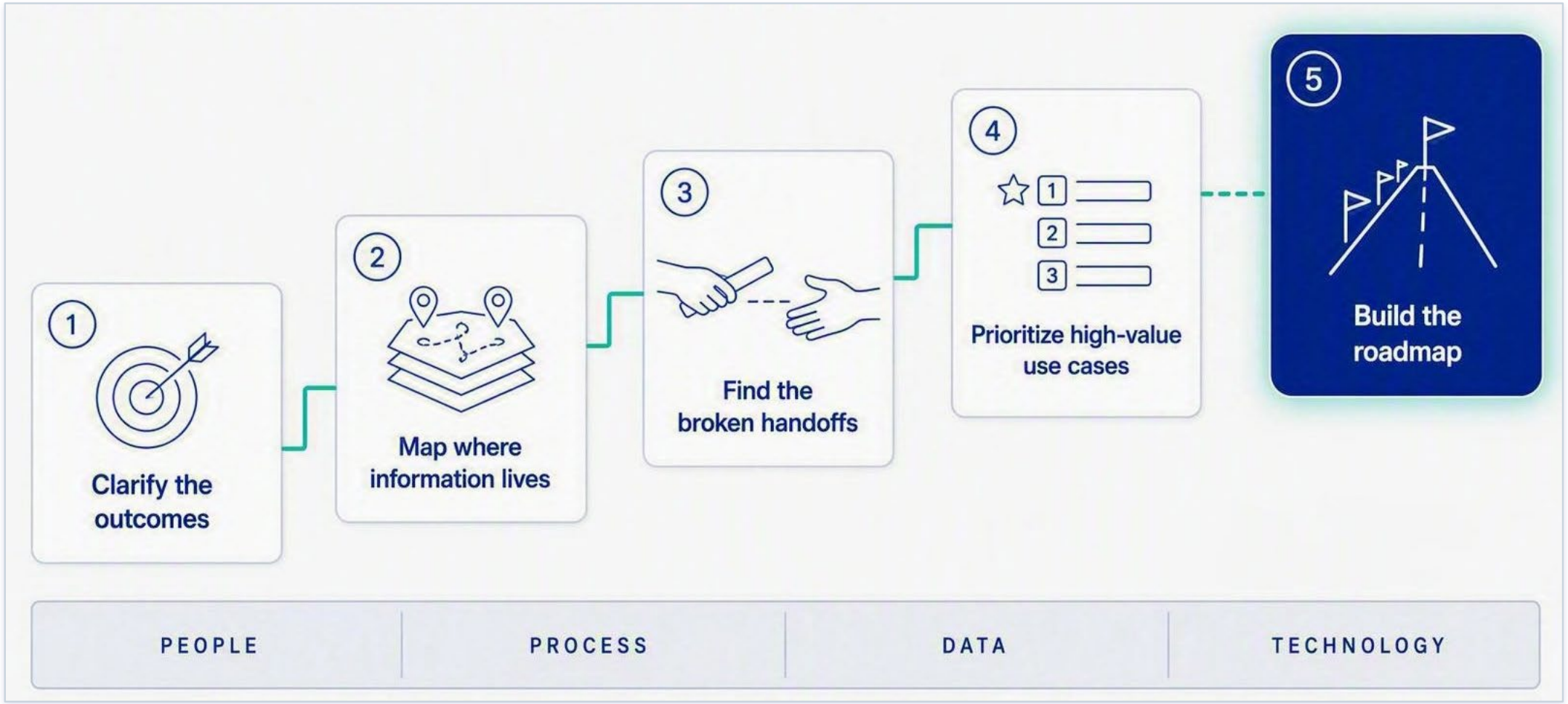
ADOPTION IS A BUSINESS DESIGN ISSUE

People are more likely to adopt CRM when it helps them succeed, not when it primarily helps someone else monitor them.

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Where do you start?

BEGIN WITH THE BUSINESS OUTCOME, NOT THE SOFTWARE FEATURE LIST.



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How Forvis Mazars supports the CRM journey

FROM BUSINESS STRATEGY THROUGH SUSTAINED ADOPTION AND VALUE

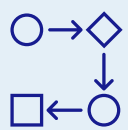
1



Understand

- CRM strategy and readiness
- Current-state and process review
- Data quality and governance
- Platform assessment and selection

2



Design

- Future-state processes
- Technology and integration architecture
- Implementation roadmap
- High-value use-case prioritization

3



Deliver

- CRM implementation and integration
- Data migration
- Automation and analytics
- Training and adoption

4



Evolve

- Upgrades and enhancements
- Ongoing support
- AI and Copilot readiness
- Continuous improvement

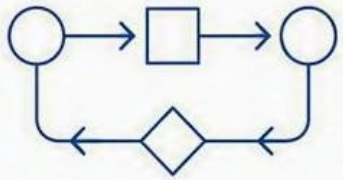
Understand where you are → **Design where you need to go** → **Deliver the solution** → **Evolve as the business changes**

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The Forvis Mazars Approach

BUSINESS UNDERSTANDING AND TECHNOLOGY CAPABILITY, BROUGHT TOGETHER.



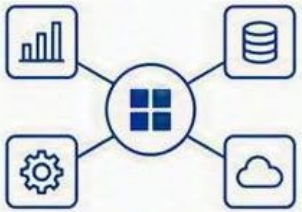
BUSINESS-PROCESS LED

We begin with how the organization works and what it needs to achieve.



END-TO-END CAPABILITY

From assessment and selection through implementation, integration, training, and support.



MICROSOFT + CRM EXPERIENCE

CRM, ERP, Power Platform, data, analytics, automation, and AI across the Microsoft ecosystem.



A BROADER BUSINESS PERSPECTIVE

Connect CRM conversations with finance, operations, reporting, risk, and industry considerations.

People + Process + Data + Technology

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CRM FOR GROWTH

If your CRM is only telling you what happened, it is a database. If it is helping you decide what to do next, it is a growth engine.

Customer relationships create growth. CRM helps the organization see them, strengthen them, and act on them.

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Q&A



Business Technology Services

Questions?

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