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The CIO Guide to CRM Modernization and AI Readiness

15 questions every manufacturing and distribution CIO should answer before modernizing Dynamics 365, optimizing Salesforce, or building an AI-ready customer technology foundation

CRM modernization is no longer just a business application project. For CIOs, it is a customer technology strategy that must connect CRM, ERP, service operations, analytics, governance, security, workflows, and AI readiness. This guide helps CIOs and IT leaders evaluate whether the current CRM environment is ready to support customer operations, Copilot, agentic AI, self-service analytics, and enterprise intelligence.



Why CRM modernization matters now

Manufacturing and distribution organizations are under pressure to improve customer visibility, automate manual sales and service workflows, reduce technology complexity, and scale AI responsibly. CRM sits at the center of that challenge because customer, account, quote, service, dealer, distributor, and operational data often flow through or around CRM. If that foundation is fragmented, AI and analytics initiatives will struggle to deliver reliable business value.

The 5 signs your CRM technology foundation is holding back AI readiness



CRM and ERP are not consistently integrated



Sales, service, finance, and operations work from different customer records or reports



Customer data quality requires manual cleanup before reporting or automation



CRM workflows depend on spreadsheets, email, or undocumented side processes



Security, governance, data lineage, and AI controls are not clearly defined for customer data

Microsoft Dynamics modernization checklist for CIOs

- ☐ Is Dynamics 365 configured around current business processes rather than legacy assumptions?
- ☐ Is Dataverse structured cleanly enough to support reporting, integration, and AI?
- ☐ Are Sales, Customer Service, Field Service, Finance & Operations, Power Platform, Power BI, and Fabric aligned?
- ☐ Are workflows automated with appropriate governance?
- ☐ Are dashboards trusted by executives and business users?
- ☐ Are Copilot or other Agentic AI experiences supported by clean data and role-based access?
- ☐ Is there a roadmap for platform optimization, release management, and managed services?

Salesforce modernization / migration checklist for CIOs

- ☐ Is Salesforce still the right long-term platform for the existing and planned enterprise architecture?
- ☐ Are Salesforce integrations with ERP, reporting, service, and Microsoft 365 creating unnecessary complexity?
- ☐ Are Salesforce objects, automations, reports, and workflows documented and supportable?
- ☐ Is Salesforce data properly integrated with your data warehousing and analytics solutions?
- ☐ Can data be migrated cleanly if the organization transitions to Dynamics 365?
- ☐ Would Dynamics 365, Power Platform, Power BI, Fabric, Azure, and Copilot alignment reduce long-term platform friction?
- ☐ Is the CRM renewal or roadmap decision informed by technical, business, and financial criteria?

Recent examples of modernization in action

Global Logistics & Manufacturing

- ▶ Korcomptenz replaced fragmented CRM and service systems with a connected Dynamics 365 ecosystem, including Dynamics 365 Sales Hub, Field Service, Finance & Operations, Dataverse, Power Platform, and Power BI.

Manufacturing Customer Service

- ▶ Korcomptenz helped a global manufacturer unify dealer, warranty, and support operations using Dynamics 365 Customer Service, Copilot, AI-powered routing, Power Pages, IVR integration, and workflow automation.



CRM modernization roadmap for CIOs



Current-state technology and process assessment



Application portfolio and CRM usage review



Data model, integration, security, and reporting review



Platform path decision: optimize, extend, consolidate, or migrate



Quick-win workflow and reporting modernization



Copilot and CRM AI readiness plan



Future-state architecture and phased roadmap



Managed services, governance, release management, and continuous optimization

CRM AI You Can Use Right Now

Many CIOs are asked to “do something with AI,” but the most practical CRM AI opportunities are often already available through modern CRM and Microsoft 365 experiences. The key is to start with use cases that improve productivity without depending on a large-scale AI transformation program.

1 Sales AI:

- Opportunity and account summaries, meeting preparation, pipeline updates, next-best actions, follow-up drafting, and forecast support.

2 Service AI:

- Case summaries, knowledge recommendations, response drafting, intelligent routing support, SLA visibility, and service trend identification.

3 Management AI:

- Pipeline risks, service backlog insights, account health summaries, executive dashboard narratives, and prioritization prompts.

4 Data readiness AI:

- Duplicate detection, field completion support, enrichment recommendations, and automated insight generation where source data is trusted.

The CIO takeaway: practical AI starts with CRM modernization. Clean data, secure access, integrated workflows, and trusted reporting allow organizations to expand from assisted productivity to governed agentic workflows over time.



Ready to modernize CRM into a secure, governed, AI-ready customer technology foundation? Schedule a CRM Modernization and AI Readiness Assessment with Korcomptenz.



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Thank you for reading

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Get in touch with us:

+1 (973) 601 8770
sales@korcomptenz.com

www.korcomptenz.com