



Korcomptenz

DYNAMICS 365 CRM MODERNIZATION PLAYBOOK

*Connect Customer-Facing
Processes Around a Common
Data and Business Platform*

www.korcomptenz.com

Expert-led Transformation.
Impact-led Growth.



CRM MODERNIZATION IS BIGGER THAN CRM REPLACEMENT

Replacing a legacy CRM may solve a technology problem. It does not automatically solve the business problem.

If sellers still rely on spreadsheets, service lacks sales context, ERP owns critical customer data, and managers cannot trust the pipeline, moving to a new CRM simply recreates old problems on a newer platform.

The opportunity is bigger: connect the processes that shape the customer relationship—from engagement and selling to service, field execution, data, automation, and downstream operations.

The goal is not simply a newer CRM. It is a more connected customer operating model.

THE EXECUTIVE CASE FOR MODERNIZATION

Revenue velocity

Reduce friction from engagement through opportunity, conversion, and handoff.

Customer continuity

Connect marketing, sales, service, and field interactions around shared customer context.

Operating leverage

Reduce manual work, duplicate entry, unnecessary handoffs, and fragmented workflows.

Management visibility

Improve confidence in pipeline, customer activity, service performance, and business outcomes.

AI readiness

Establish trusted data, governed processes, and secure access before scaling Copilot, agents, and automation.



FIVE MODERNIZATION PRINCIPLES

Journey before application

Define customer, seller, service, and field journeys before selecting applications.

Process before configuration

Simplify legacy processes before rebuilding them.

Ownership before integration

Decide which systems own customer, product, pricing, order, asset, and other critical data.

Outcome before AI

Start with the business problem, then select the right technology.

Baseline before transformation

Measure current performance so modernization value can be demonstrated.

START WITH THE CUSTOMER LIFECYCLE

Stage	Business Need	Microsoft Capability
Engage	Segment audiences and orchestrate journeys	Dynamics 365 Customer Insights - Journeys
Sell	Manage leads, accounts, opportunities, and pipeline	Dynamics 365 Sales
Serve	Manage cases and customer interactions	Dynamics 365 Customer Service
Deliver	Manage work orders, technicians, resources, and assets	Dynamics 365 Field Service
Connect	Link CRM and ERP data and processes	Dataverse, integration services, dual-write where appropriate
Extend	Automate workflows and build apps	Microsoft Power Platform

Applications should support the journey—not define it.

DON'T REBUILD LEGACY CRM DEBT IN DYNAMICS 365

Before rebuilding a legacy process, ask whether it still supports the desired business outcome.

Prioritize:

- Fewer handoffs and duplicate entry
- Standardized sales and service processes
- Clear data ownership
- Fewer unnecessary customizations and reports
- Role-based user experiences
- Measurable pre-implementation baselines

FOUR CUSTOMER-FACING MODERNIZATION PLAYS

ENGAGE

Use Dynamics 365 Customer Insights - Journeys to orchestrate segment- and trigger-based engagement.

Focus: Segmentation, journeys, consent, communication governance, sales handoffs

Measure: Engagement, qualified leads, journey conversion, pipeline contribution

SELL

Use Dynamics 365 Sales to improve seller workflows, pipeline visibility, and opportunity management.

Focus: Qualification, opportunity stages, seller productivity, pipeline visibility, adoption

Measure: Conversion, win rate, sales cycle, pipeline aging, forecast accuracy

SERVE

Use Dynamics 365 Customer Service to improve case management and customer continuity.

Focus: Case routing, knowledge, SLAs, service workflows, agent productivity

Measure: Response time, resolution time, backlog, SLA performance, customer satisfaction

DELIVER

Use Dynamics 365 Field Service to connect onsite execution with customer and asset context.

Focus: Work orders, scheduling, assets, technician productivity, preventive maintenance

Measure: First-time fix, travel time, utilization, repeat visits, downtime

DATA AND INTEGRATION: DECIDE OWNERSHIP FIRST

Dataverse provides the common data foundation for Dynamics 365 customer engagement applications, but connected architecture still requires clear ownership.

Ask:

- » **Who owns the customer master?**
- » **Where are products and prices mastered?**
- » **Which processes truly need real-time integration?**
- » **Which historical data belongs in CRM?**
- » **How will integration failures be monitored?**

Connected architecture does not mean every system should contain every piece of data.

AI AND AUTOMATION: START WITH THE BUSINESS PROBLEM

AI should strengthen a well-designed process—not compensate for poor data or unclear ownership.

Define — What task, decision, or bottleneck needs improvement?

Validate — Is the required data trusted and accessible?

Confirm — What capabilities are available in the target environment?

Choose — Configuration, Power Platform, Copilot, agents, custom AI, or another approach?

Measure — What business outcome should improve?

Practical opportunities include seller productivity, service productivity, knowledge discovery, workflow automation, decision support, and predictive insights.



A PRAGMATIC MODERNIZATION ROADMAP

Dataverse provides the common data foundation for Dynamics 365 customer engagement applications, but connected architecture still requires clear ownership.

Assess

Processes, applications, data, customizations, integrations, and baselines.

01

Design

Future customer, seller, service, and field journeys.

02

Rationalize

Remove unnecessary data, workflows, reports, customizations, and point solutions.

03

Architect

Define systems of record, integrations, security, applications, and licensing.

04

Build, integrate & migrate

Configure Dynamics 365, extend where justified, and migrate only required data.

05

Adopt

Test end-to-end journeys, enable users by role, and establish governance.

06

Measure

Compare business and operational outcomes against the original baseline.

07

THE KORCOMPTENZ DIFFERENCE

Korcomptenz approaches CRM modernization as a connected business transformation—not an isolated Dynamics implementation.

We combine Dynamics 365 with ERP, Power Platform, data, integration, automation, and AI expertise to connect customer-facing processes with the operational systems behind them.

Our approach emphasizes:

Process rationalization before configuration

CRM and ERP working as one connected operating model

Clear data ownership and integration governance

Practical, outcome-led AI and automation

Business baselines and measurable value realization

START THE MODERNIZATION CONVERSATION

Where is CRM creating the most friction?

**Disconnected journeys | Unclear data ownership | Manual CRM-to-ERP handoffs |
Low adoption | Excessive customization**

Start with the business journey. Work backward to the technology.

Talk to a Dynamics 365 Modernization Expert



Thank you for reading

DYNAMICS 365 CRM MODERNIZATION PLAYBOOK

Connect Customer-Facing Processes Around a Common Data and Business Platform

Get in touch with us:

+1 (973) 601 8770

sales@korcomptenz.com

www.korcomptenz.com