



Korcomptenz



The Manufacturing & Distribution CRM Modernization Guide

15 questions every CIO, COO, CRO, and service leader should answer before modernizing Dynamics 365, optimizing Salesforce, or moving to an AI-ready CRM platform

Manufacturing and distribution companies do not need another CRM project. They need a connected customer operating model that aligns sales, service, dealers, distributors, field operations, finance, ERP, reporting, and AI.

This guide helps leadership teams evaluate whether their current CRM environment is ready to support modern customer operations, faster sales execution, service transformation, and AI-enabled decision-making.

Why CRM modernization matters now

Manufacturers and distributors are under pressure to improve customer visibility, accelerate quoting, strengthen dealer and service operations, improve forecasting, and create an AI-ready data foundation. CRM modernization becomes a strategic priority when disconnected systems prevent sales, service, finance, and operations from acting on the same customer information.



The 5 signs your CRM is holding the business back



Sales teams do not trust pipeline or account data



Quote and proposal generation depends on manual effort



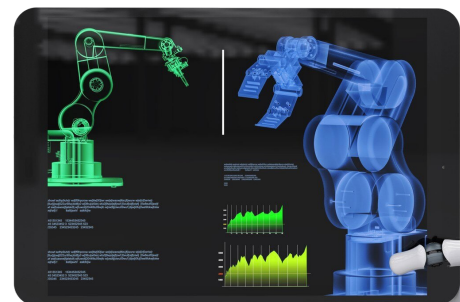
Customer service is fragmented across email, calls, portals, IVR, and spreadsheets



CRM and ERP are not aligned around customer, product, pricing, order, and service data



Leadership cannot get real-time visibility without manual reporting



Microsoft Dynamics modernization checklist

- ☐ Are Sales Hub and Customer Service being used beyond basic activity tracking?
- ☐ Are leads, opportunities, quotes, cases, service assets, and customer records standardized?
- ☐ Is Dynamics integrated with F&O, Business Central, SAP, or another ERP?
- ☐ Are approval workflows automated?
- ☐ Are dashboards embedded into management routines?
- ☐ Are Copilot features ready to be adopted?
- ☐ Is Dataverse structured to support Power BI, Fabric, and AI?

Salesforce modernization / migration checklist

- ☐ Is Salesforce still aligned to the company's operating model?
- ☐ Are there redundant systems around Salesforce?
- ☐ Are HubSpot, service tools, portals, and ERP integrations creating complexity?
- ☐ Can leadership trust CRM reporting?
- ☐ Are licensing, integration, and support costs increasing?
- ☐ Would Microsoft 365, Teams, Power BI, Fabric, Azure, and Copilot alignment create more value?
- ☐ Is there a practical migration path that minimizes business disruption?

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.



The CRM modernization roadmap



Current-state assessment



Process and persona mapping



Data and integration review



Platform decision: optimize, extend, or migrate



Sales and service workflow modernization



Reporting and executive dashboard modernization



Copilot and AI readiness

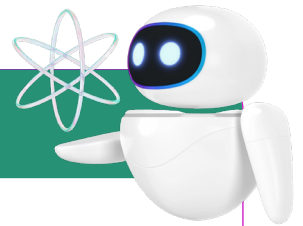


Roadmap, quick wins, and phased implementation plan

The Enterprise Data and AI Backbone

AI is no Longer a future Investment. It is a productivity tool available today.

Many manufacturing and distribution organizations are interested in AI but struggle to identify practical starting points. The good news is that modern CRM platforms already include AI capabilities that can improve sales productivity, customer service, forecasting, and customer visibility without requiring a large-scale AI transformation project.



Immediate Sales AI Use Cases

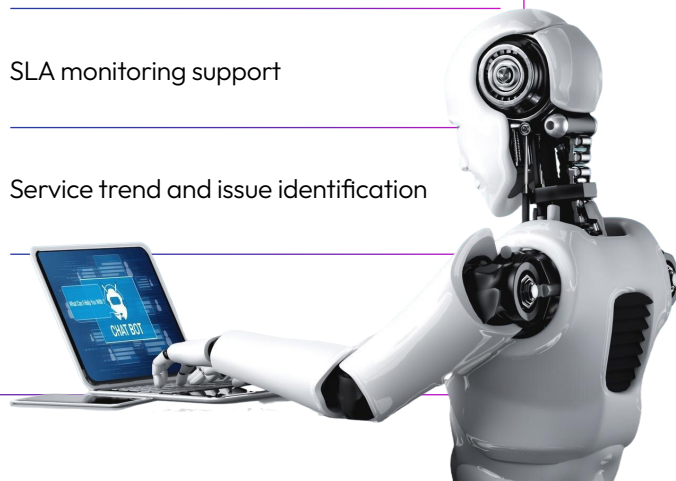
Organizations can begin improving seller productivity by leveraging AI for:

- ▶ Opportunity and account summaries
- ▶ Meeting preparation and account research
- ▶ Automated follow-up recommendations
- ▶ Pipeline prioritization
- ▶ Deal risk identification
- ▶ Forecasting support
- ▶ Email drafting and response assistance

Immediate Customer Service AI Use Cases

AI can also help service organizations reduce manual work and improve response times through:

- ▶ Case summarization
- ▶ Knowledge article recommendations
- ▶ Intelligent routing and prioritization
- ▶ Agent assistance during customer interactions
- ▶ Automated follow-ups
- ▶ SLA monitoring support
- ▶ Service trend and issue identification



Implementation Success Factors

The greatest value does not come from AI alone. It comes from combining CRM, service, ERP, analytics, and customer data into a connected platform that gives AI access to trusted business information. Organizations that modernize CRM today create the foundation for future Copilot, Agentforce, agentic AI, predictive analytics, and customer intelligence initiatives.

Quick Self-Assessment

Ask yourself:

- Can your sales team prepare for customer meetings in minutes rather than hours?
- Can service agents access complete customer context without searching multiple systems?
- Can leaders identify risks and opportunities without manually assembling reports?
- Is your CRM data structured well enough to support Copilot or Agentforce and future AI initiatives?

If the answer to any of these questions is “no,” CRM modernization may be the fastest path to practical AI value.

Ready to modernize CRM around your actual business outcomes?

Schedule a CRM Modernization 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