

HEXAWARE

Global Professional Services Firm Achieves Unified Operations with Dynamics 365 CRM Consolidation

Achieved 20% faster time-to-close, 30% reduction in manual effort, and a 12% increase in conversion through unified processes and centralized CRM.

Case study



Client

| Client

Challenge

Solution

Benefits

Summary

A global professional services organization

A global professional services network undertaking a large-scale CRM consolidation initiative to bring all its member organizations onto a single Microsoft platform. As part of this effort, the organization is driving a unified Dynamics 365 implementation with a US-based instance to standardize operations across regions.

This transformation aims to harmonize business processes, improve data visibility, and achieve operational efficiencies, enabling more consistent collaboration and decision-making across the global network.



Challenge

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| **Challenge**

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Fragmented systems limiting global visibility

The organization was operating with siloed CRM systems across its member organizations, making it difficult to unify data, processes, and users into a single environment. Migrating diverse regional systems, including Ireland as the first pilot, into a centralized US instance required a structured Dynamics 365 CRM consolidation approach with minimal disruption to ongoing business operations.

Sales processes such as lead, opportunity, and quote-to-order management varied significantly across regions, leading to inconsistencies, manual workarounds, and limited visibility into the global pipeline. There was a clear need for a standardized Dynamics 365 implementation to bring consistency and efficiency to these core processes.

The absence of integrated marketing and sales systems further impacted lead management and campaign effectiveness. Additionally, reporting capabilities were fragmented, with limited real-time insights into performance across regions. The organization required unified analytics through tools like Power BI, along with detailed compliance and operational reporting, to support faster and more informed decision-making.

Finally, onboarding multiple member organizations across geographies introduced complexities around localization, regulatory compliance, and user adoption, making a phased and carefully managed CRM consolidation strategy essential.



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Centralized CRM with standardized processes and integrated insights

Pilot Onboarding

- Successful migration and onboarding of all Ireland member organization data, processes, and users into the centralized US instance as part of the Dynamics 365 CRM consolidation.
- Harmonized Ireland's sales processes, including lead management, opportunity management, and quote and order management through a unified Dynamics 365 implementation.
- Deployed Power BI dashboards for real-time sales and operational reporting.
- Used SSRS (SQL Server Reporting Services) for detailed management and compliance reporting.

Ongoing Consolidations

- Active discussions and requirements gathering with member organizations in France, UAE, Kaine Island, Netherlands, Denmark, and ~11 other regions as part of the broader CRM consolidation initiative.
- Phased onboarding approach tailored to each member organization's business processes, compliance requirements, and localization needs.
- Strong emphasis on minimal disruption during migration and user adoption.

Sales Process Standardization

- **Lead Management:** Centralized lead capture pipeline, scoring, and assignment workflows.
- **Opportunity Management:** Standardized sales stages and processes with integrated automation workflows.
- **Quote and Order Management:** Streamlined quote generation using configurable templates and approval workflows; order tracking linked to opportunities and customer records.

Marketing Automation Integration

- Seamless Integration of Marketo with Dynamics 365 CRM to automate marketing campaigns, lead nurturing, and data synchronization.
- Enabled personalized campaigns, engagement tracking, and direct flow of marketing-qualified leads into Dynamics CRM for faster sales follow-up.

Reporting and Analytics

- **Power BI:** Executive and sales dashboards delivering insights into pipeline health, regional performance, and marketing ROI.
- **SSRS Reports:** Detailed operational and compliance reporting, including client activity and financial tracking.



Benefits

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Improved efficiency, visibility, and growth

- Seamless cross-org collaboration and centralized data management enabled through Dynamics 365 CRM consolidation.
- Increased sales process efficiency with standardized workflows under a unified Dynamics 365 implementation.
- Enhanced marketing effectiveness via integrated automation
- Robust reporting through Power BI, leading to better decision-making and accountability.
- Improved security and compliance with advanced document controls.
- Scalability for onboarding other global member organizations smoothly with CRM consolidation.

Revenue Growth:

- 12% increase in sales pipeline conversion rate attributed to standardized lead and opportunity management across consolidated member organizations
- 15% uplift in average deal size supported by streamlined quote and order processes and improved proposal document management.

- Accelerated sales cycles resulting in 20% faster time-to-close on opportunities due to enhanced workflows and automated follow-ups enabled.

Operational Efficiency:

- 30% reduction in manual data entry and reconciliation efforts through Marketo and Dynamics 365 integration and automated lead data synchronization.
- 25% improvement in reporting turnaround time by leveraging Power BI dashboards and SSRS reports, enabling quicker executive decisions.
- 40% decrease in document processing time achieved via confidential tagging and AI-powered skipping of non-critical documents.
- 98% user adoption rate across newly onboarded member organizations driven by standardized business processes and intuitive CRM interfaces.

Compliance and Security:

- Zero significant data breaches within the consolidated instance since Ireland integration, ensured by role-based access and confidential document.
- Automated audit trails and version control on proposals enabling faster internal compliance reviews.



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Unifying global operations through CRM consolidation

A global professional services network embarked on a large-scale CRM consolidation to unify its member organizations on a single platform. Through a structured Dynamics 365 implementation, starting with Ireland as a pilot, the organization standardized sales processes, integrated marketing automation via Marketo and Dynamics 365 integration, and enabled real-time insights using Power BI.

This Dynamics 365 digital transformation case study highlights how the initiative improved data visibility, streamlined operations, and delivered measurable gains in efficiency, sales performance, and decision-making across regions.



Have questions or want to learn more?
Write to us at marketing@hexaware.com

About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

Learn more about Hexaware at <https://www.hexaware.com>.

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