

Still not sure if **Microsoft Dynamics**  
will create measurable results  
for **your** business?

It has for ours.

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We chose to unify our entire customer journey on Microsoft, end-to-end,  
resulting in our latest CSAT score of 93.9%.

**01: THE DISCONNECT CHALLENGE**

Customer data was spread across  
***disconnected systems.***

Limiting clear insight and reducing our  
ability to ***grow with confidence.***

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As a growing digital transformation partner, we needed a single, connected view of the customer journey – from our first marketing interaction through to sales, delivery, finance and ongoing engagement.

Like many organisations, when the organisation was smaller marketing data, sales activity, project delivery and customer insights risked living in separate systems, limiting visibility, consistency and scalability.

**We set out to run our own business on the Microsoft platform end-to-end, proving its value not just for clients, but in our day-to-day operations.**

9 out of 10

**IT leaders say that data silos are the biggest obstacles to digital transformation.**

We've removed our silos,  
**have you?**



Experts in AI & Data utilising cloud solutions to  
enable business transformation.

## 02 : THE MARKETING CHALLENGE

Marketing was fragmented,  
with ***data living in silos***,  
insights coming too late, and  
the ***inability to drive growth***.



We designed an integrated customer journey with Marketing as the entry point, utilising **Dynamics 365 Customer Insights (Marketing)** which enabled our marketing team to design, execute and optimise end-to-end marketing campaigns and customer journeys.

**Campaigns** are built as multi-step journeys that can be triggered by real-time customer actions, such as form submissions or event registrations, or targeted at defined audience segments based on attributes, behaviour and engagement history. **Audiences** are dynamically segmented using unified customer data, ensuring campaigns remain relevant as customer behaviour changes.

**Campaign execution** spans multiple channels, including email, events and digital landing pages, allowing us to engage customers consistently across touchpoints. **Embedded AI and Copilot capabilities** further enhance campaign management by assisting with content creation, recommending optimised journeys, summarising performance in natural language and helping teams refine campaigns based on real-time insight.

# 324%

### ROI over three years

ServerSys, Calculating the ROI of Microsoft Dynamics 365 Customer Insights (2025)

# 75%

### reduction in time spent building customer journeys

Forrester, The Total Economic Impact of Microsoft Dynamics 365 Customer Insights (2024)

**Every interaction, from event attendance to content engagement, is captured against the customer record, giving Marketing a clear view of what resonates and why.**

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### 03 : THE SALES CHALLENGE

Sales lacked momentum, with ***fragmented customer insight***, manual handovers, and an ***inconsistent view of the pipeline***.



As customer engagement increased, Sales needed full visibility of customer context to progress opportunities effectively. Previously, insight from marketing interactions, prior conversations and delivery history **risked being lost across** handovers, creating duplication, manual effort and slowed deal progression.

**Opportunities are progressed end-to-end** within Dynamics 365 Sales, with full visibility of prior marketing engagement, communications and history captured against the customer.

**Pipeline management and forecasting are driven** from live opportunity data, giving Sales leadership confidence in revenue projections and deal progression.

**Embedded AI and Copilot capabilities support sellers** by summarising opportunities, highlighting next best actions, assisting with follow-ups and prioritising opportunities based on likelihood to close, reducing administration and improving focus.

87%

**of people are likely to avoid a company after one bad customer experience**

Accenture, Customer Service on the Brink (2025)

64%

**of customers rate service quality as the most important factor setting companies apart**

Accenture, Customer Service on the Brink (2024)

**By keeping Sales connected to the same customer system as Marketing and Delivery, we ensure continuity, context and consistency at every stage of the customer journey.**

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## 04 : THE FINANCE CHALLENGE

Finance operated, with ***manual processes***, delayed insight, and ***limited visibility*** from opportunity to revenue.



As the business scaled, Finance **required a system that could support growth** while remaining tightly aligned with Sales and Delivery. Disconnected finance tools and manual processes reduced visibility into true customer and project profitability.

**We unified Finance on Dynamics 365 Business Central**, creating a single financial foundation connected directly to the wider customer journey.

Financial transactions including invoicing, revenue and costs are managed within Business Central, providing Finance with a **real-time view of performance** without reliance on manual reconciliation.

**Billing and financial processes are standardised and automated**, reducing time spent on month-end close and improving accuracy across the organisation.

Up to **18%**  
**improvement in finance and  
operations staff productivity**

Forrester, Total Economic Impact Report (2018)

**30%**  
**reduction in monthly time-to-  
close by Year 3**

Forrester, Total Economic Impact Report (2018)

**By connecting Finance into the same customer system used by Sales and Delivery, we gained a clear line of sight from opportunity through to revenue, enabling stronger financial governance and forecasting.**

## 05 : THE OPERATIONS CHALLENGE

Operations faced,  
***manual handovers,***  
 inconsistent execution, and  
***limited end-to-end visibility.***



Effective delivery relies on clear handovers, consistent execution and access to customer context. Without a connected system, **operational teams risked rework, duplicated effort and loss of insight** once opportunities moved from Sales into delivery.

**We unified Operations using the Power Platform,** enabling delivery processes to operate within the same connected customer ecosystem as Marketing, Sales and Finance.

Handover from Sales to **delivery is standardised and automated,** ensuring delivery teams receive consistent customer information and requirements without manual intervention.

**Operational workflows are supported** through low-code applications and automation, reducing reliance on manual tasks and enabling teams to scale efficiently as the business grows.

Up to **35%**

**faster operation throughput**

McKinsey, Digital service excellence: Scaling the next-generation operating model (2021)

**50%**

**faster development cycles**

Forrester, Total Economic Impact Report (2018)

**As Operations remain connected to the same customer record across the organisation, delivery teams retain full visibility of customer context, supporting stronger outcomes and long-term customer relationships.**

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Companies with strong cross-functional alignment **grow revenue up to 19% faster** and are **15% more profitable**.

Forrester, Total Economic Impact Report (2018)

By running our entire business on Microsoft Dynamics, we have been able to create a fully connected, data-driven operating model across marketing, sales, finance, and operations. This integration enables more targeted marketing, faster and more informed sales decisions, streamlined financial management, and efficient, scalable operations, all powered by a single source of truth.

The result is improved collaboration, greater visibility across the business, and the ability to deliver better customer experiences while driving sustainable growth.

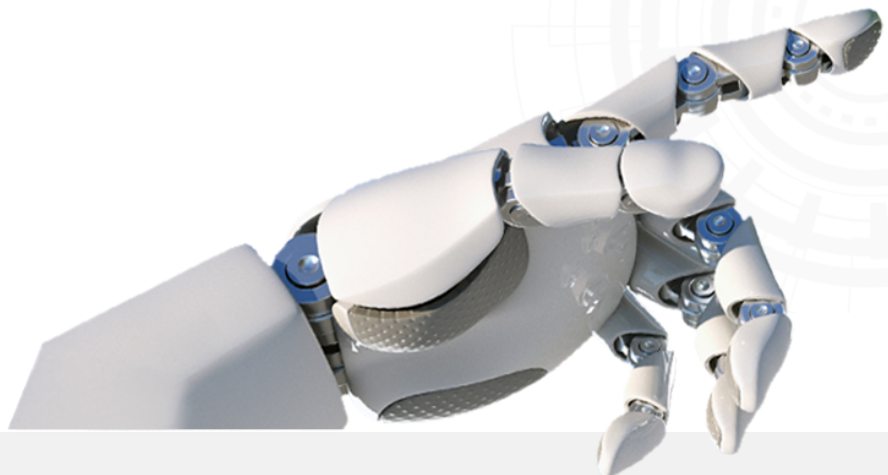


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benefiting from what Microsoft  
solutions can offer.

One conversation can  
change that.

[www.tekenable.com](http://www.tekenable.com)



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