

CASE STUDY

Driving Mid-Market Transformation with Microsoft Dynamics 365



Executive Summary

When a global mid-market technology manufacturer specializing in connectivity and IT infrastructure solutions sought to eliminate silos and modernize its customer engagement operations, it turned to Technology Alliance Solutions (TAS). Operating across more than 20 countries, the company faced fragmented systems, rising compliance pressures, and an urgent need for scalability. TAS partnered with executive leadership to architect a unified Dynamics 365 ecosystem—integrating Sales, Marketing, and Customer Service within a cloud-first, data-driven framework. The transformation delivered measurable improvements in sales velocity, marketing ROI, and customer satisfaction, establishing a scalable digital foundation for continued global growth.



30% Faster sales cycle



Double-digit marketing ROI uplift



Higher customer satisfaction

Client Background

The client is a global mid-market manufacturer of high-performance connectivity and IT infrastructure solutions, serving enterprise and government customers worldwide. Known for quality, innovation, and reliability, the company had grown rapidly—but its legacy systems couldn’t keep pace with increasing operational complexity. Disconnected platforms across sales, marketing, and service limited visibility, hindered collaboration, and created data silos across regions. Leadership recognized the need for a unified, modern platform that could deliver real-time insights, streamline operations, and elevate customer experiences at scale.



The Challenge

Despite strong market presence, the client’s growth was constrained by limitations in its existing technology stack:

Fragmented systems

CRM, marketing, and customer service platforms operated in silos, creating data inconsistencies and operational inefficiencies.

Limited visibility

Executives lacked a holistic view of the sales pipeline and customer interactions, impeding data-driven decisions.

Outdated marketing model

Reliance on legacy outbound campaigns restricted personalization, agility, and omnichannel engagement.

Customer service inefficiencies

Manual processes and inconsistent case resolution slowed response times and eroded satisfaction.

Compliance risks

Reliance on legacy outbound campaigns restricted personalization, agility, and omnichannel engagement.

Global scalability challenges

Manual processes and inconsistent case resolution slowed response times and eroded satisfaction.

The TAS Solution

Technology Alliance Solutions (TAS) was engaged as the trusted partner and Dynamics 365 Subject Matter Expert, providing strategic leadership and technical execution across Sales, Marketing, and Customer Service. TAS designed and delivered a transformation program aligned with enterprise-grade best practices:



Sales Enablement

Implemented centralized CRM functionality to unify data, accelerate pipeline management, and improve forecasting accuracy.



Marketing Modernization

Architected a **Real-Time Marketing Transition Plan**, shifting from outbound campaigns to automated, event-triggered journeys tailored to customer behavior.



Customer Service Optimization

Reimagined service operations with advanced case routing, queue management, and escalation protocols to streamline resolution and elevate customer satisfaction.



Consent and Compliance

Developed a **Consent and Preference Management Center** to ensure regulatory alignment and strengthen trust through transparent customer choice.



Data Enrichment

Integrated **Dun & Bradstreet data**, improving segmentation, accuracy, and actionable insights across commercial operations.



Customer Engagement Portals

Configured embedded marketing forms and self-service capabilities within **Power Pages**, extending digital engagement touchpoints.



Process Automation

Built **Power Platform** extensions to support cross-functional workflows, ensuring scalability and data integrity.



Governance & Deployment Excellence

Directed DevOps with **CI/CD pipelines** for controlled, consistent solution deployment and lifecycle management.



Adoption & Training

Delivered comprehensive training for executives and operational teams, embedding governance protocols and empowering sustainable adoption.

Results

The engagement delivered measurable, enterprise-level outcomes that positioned the client for sustained growth:

30%
Faster Sales Cycle

Enabled by centralized data and enhanced visibility.

25%
Uplift in ROI

Through automated, personalized omnichannel campaigns

20%
Improvement in Satisfaction Scores

Through optimized case management and faster resolution.

Compliance

Regulatory compliance achieved through a global Consent and Preference Management Center.

Data

Enhanced accuracy and usability through third-party integration and governance protocols.

Scalability

A platform designed to support future international expansion and digital maturity.

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With TAS, we transitioned from outdated, siloed processes to a modern, integrated platform that empowers our teams and enhances customer trust. Their expertise in Dynamics 365 Sales, Marketing, and Customer Service was invaluable in achieving our vision.

— Marketing Director, Global Manufacturer

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Why TAS

Trusted Advisor:

Deep expertise in Dynamics 365, Power Platform, and Cloud Solutions, delivering business-critical transformations.

Proven Excellence:

Demonstrated success across SMB, mid-market, enterprise, and public sector organizations.

Strategic Acumen:

Consultants combine technical mastery with executive-level business insight.

Differentiated Approach:

Cross-industry experience, governance expertise, and the ability to align technology with compliance and ROI goals.

Measurable Outcomes:

TAS translates complex requirements into quantifiable improvements in competitiveness, efficiency, and long-term scalability.



Ready to Modernize Your Business Applications?

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