

IMPLEMENTATION OF MICROSOFT DYNAMICS 365

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Abstract

The main objective of this text is to examine the practical use of the CRM model in a selected company and to propose a process for implementing Microsoft Dynamics 365. By doing so, it is possible to better understand how this technology can positively impact business growth, increase customer satisfaction, and improve the efficiency of internal operations. The text also includes an evaluation of the expected results and benefits for the company and the formulation of recommendations for further development and optimization of the use of CRM in this organization. This text will be useful for managers and executives who want to better adapt themselves to the new era of digital transformation and sustainable development.

Keywords

Microsoft Dynamics 365, CRM, Technological Innovation Management, Strategic Planning

I. Introduction

In today's rapidly evolving world, the ability to effectively manage customer relationships is becoming a key element of business success. It is essential for modern companies to have tools that enable a qualitative and systematic approach to customers, which not only increases competitiveness, but also helps to identify new opportunities and improve internal processes. In this text, the focus is on one of the key platforms for customer relationship management, Microsoft Dynamics 365.

The text is structured into three main chapters. The first one deals with Microsoft Dynamics 365, its basic characteristics, main functions, and modules, as well as its general benefits for businesses. The second chapter is devoted to the implementation of this system in the selected company, dealing with the characteristics of the company, the identification of their needs and goals, and subsequently the design of the implementation process itself. The third chapter focuses on a comprehensive assessment of the expected results and benefits that the organization will gain from the implementation of Microsoft Dynamics 365. Finally, key findings and outputs are summarized, and recommendations for further development and effective use of CRM in this company are presented.

It is hoped that this text will contribute to a better understanding of the importance and possibilities of CRM in the context of modern business and provide concrete inspiration in the form of Microsoft Dynamics 365 implementation for other organizations that consider improving their relationship with customers as an important part of their business.

II. Main text

Microsoft Dynamics 365

The modern corporate environment is constantly evolving, and it comes with the need for effective management of corporate processes and customer relationships. It is in this context that Microsoft Dynamics 365, a comprehensive customer relationship management (CRM) and enterprise resource planning (ERP) system, enters the scene. This chapter focuses on the basic characteristics of this system, its main functions and modules, and, last but not least, the advantages and benefits it can bring to the corporate environment.

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System basic characteristics

In the world of business applications, business leaders are constantly striving to find better business process automation to achieve digital transformation, to take fully advantage of intellectual property assets and increase its competitiveness (MacGregor Pelikánová, 2019). Digital transformation does not only mean the use of advanced technological tools but also the optimization of various business processes (Pal, 2020, p. 7) and the pro-sustainable increase of effectiveness and efficiency and decrease of waste (MacGregor et al., 2020). For the past few years, Microsoft has been building smart applications enriched with artificial intelligence and analytics features. These applications are designed for very specific purposes; however, at the same time, they are able to communicate with each other and exchange necessary information (Yadav et al., 2020, p. 7).

Microsoft Dynamics 365, which has seen significant popularity since its inception, with more and more companies now accessing applications from its full suite, represents the next generation of intelligent business applications in the cloud offered by Microsoft. It can fully adapt to individual needs and requirements tailored to the specific business, and individual technologies are constantly developed and innovated in line with the current needs of companies in each era (Konica Minolta IT Solutions Czech, 2019).

It is an integrated software system that unifies customer relationship management (CRM) and enterprise resource planning (ERP) into one comprehensive solution. This interconnectedness allows organizations to gain a holistic view of their business, enabling the effective management of key aspects in one consistent environment while helping organizations transform the way they do business (Yadav et al., 2020, pp. 7-8).

System main functions and modules

Microsoft Dynamics 365 offers a wide range of features and modules that cover various aspects of business operations. Individual modules and functionalities can be deployed independently. The customer can start with what they need and add more applications as their business evolves (Yadav et al., 2020, p. 8). An overview of the key areas of focus for Microsoft Dynamics 365 is presented below (Konica Minolta IT Solutions Czech, 2019):

Sales (CRM) – The Sales module supports the sales process from acquiring a potential customer to closing the deal. It has the tools for fast, clear, and efficient deal planning, resulting in increased sales team performance and profit growth.

Marketing (CRM) - The Marketing module is an integrated marketing platform for the planning, execution, and analysis of multi-channel campaigns. Using this module, you can link your sales and marketing activities to get a comprehensive overview of your contacts. It is also easier to find potential customers, identify their needs and expectations, and nurture them from the very first contact.

Enterprise Processes (ERP) – This module has the tools to efficiently manage operations, accelerate and improve manufacturing processes, and rapidly grow productivity by providing an intelligent user interface, leveraging the Internet of Things, and delivering proven business strategies to make the right decisions.

Finance (ERP) – The Finance module is a simple business and financial management solution for all small and medium-sized organizations. It covers the processes of ordering, sales, invoicing, and reporting.

Customer Service (CRM) – This module has the tools to ensure maximum customer satisfaction and loyalty by linking self-service portals and direct and assisted services. The unified platform will allow customers to be served at any time and through any channel.

Project Management (CRM) – The project management module focuses on understanding customer needs, informing and professionalizing the project team, optimizing growth, and strengthening

the position of a reliable supplier, leading to higher client loyalty. It contains tools for planning, creating, managing, and reporting on projects.

Field Service (CRM) – This module provides fast and professional management of field service - installation, repair, and maintenance. It provides quality service thanks to integrated communication with the customer, strengthening the work of dispatchers, and providing maximum information and equipment to field staff.

Supplier Relationship Management system (SRM) – is interconnected with accounting software or ERP systems (SAP R/3, Microsoft AX, etc.), where invoices and payments to individual suppliers are recorded in order to evaluate the fulfilment of negotiated conditions and prices, to compare the contracted and actual expenditures with suppliers, and also to evaluate the quality of individual invoiced deliveries. This part of the system allows you to evaluate the portfolio of suppliers in a given category, invite them to a new tender, and ensure continuous supply.

Talent – This module facilitates the recruitment process and helps select the right people. At the same time, it also enables organizations to engage employees and optimize internal HR programs. The system is designed to provide HR managers with up-to-date information at every stage of the recruitment process so that they can make informed hiring decisions.

Advantages and benefits for business

Within the business environment, Microsoft Dynamics 365 brings many significant advantages and benefits that fundamentally impact the way organizations operate and achieve their goals. These benefits deliver value across different levels of the business while strengthening the competitiveness and innovation of the organization.

More efficient use of resources and reduced system operation and maintenance costs are two of the key benefits of using Dynamics 365. Thanks to the scalability of the solution, it can be easily adapted to the specific needs of the organization. This approach enables a quick and flexible response to changing conditions in the business environment, which is a significant factor for successful market performance (Millennium, 2023).

Connecting the work of different departments and improving the customer experience are other key benefits of CRM solutions within Dynamics 365. This integration leads to a more efficient flow of information and faster coordination, which translate to better overall performance of the organization and higher customer satisfaction (Millennium, 2023). In addition, Dynamics 365 also offers a comprehensive overview of the company's operations, which is essential for making informed management decisions. Access to up-to-date data and information makes it easier for management to move more effectively towards achieving strategic goals (Konica Minolta IT Solutions Czech, 2019).

Another significant benefit is the automation and acceleration of work processes. Dynamics 365 enables employees to perform their tasks more easily and quickly by automating routine activities. The freed-up time can be effectively used, for example, to improve customer care, process orders faster, or find innovations for the further growth and development of the company (Konica Minolta IT Solutions Czech, 2019).

In this way, Microsoft Dynamics 365 delivers much more than just a data management tool. It is a comprehensive solution that enables organizations to respond effectively to the challenges of today's business world, achieve sustainable growth and success, and optimize business operations to the maximum level (Pal, 2020, p. 7)

III. Martial and methods

This part is dedicated to the implementation of Microsoft Dynamics 365 in a chosen company. First, the company is introduced, and then its needs and goals are identified, which serve as the basis

for the subsequent implementation plan. The focus is on the key steps and factors of the implementation process that can significantly influence the success and results of this transformation.

Company characteristics

For the purposes of this text, Company X has been selected and has not consented to the publication of its name in this paper. It is an educational institution that emphasizes the provision of quality tutoring for pupils, students, children, and parents who want to effectively manage their schooling and achieve excellent results in their education. Their activities concentrate on a number of aspects that are essential to supporting the development of the educational process.

Within the portfolio of services offered, the company primarily focuses on comprehensive tutoring of subjects taught in primary and secondary schools. There is an expert team of teachers and lecturers with in-depth knowledge in their respective fields to support students through challenging assignments and preparation for tests or entrance exams. The institution emphasizes a personalized approach, which means that it tries to take into account the unique learning style of each student. Learning at Company X thus becomes a personalized process that respects the diverse needs and abilities of individual learners.

The link between tutoring and practical situations in the school environment is also an important part of the company's approach. Students are motivated to actively participate and apply theoretical knowledge in real-life situations, which creates a strong foundation for their success and development in the future. Overall, Company X is a place where expertise, individual care, and modern training methods are combined. They strive to ensure that pupils and students reach their maximum potential and become confident, competent individuals ready for a successful and promising future (company website, 2023).

Identification of company needs and objectives

To achieve continued growth and strengthen its position in the education market, Company X aims to implement Microsoft Dynamics 365 to streamline and innovate its operational processes. This chapter identifies the key needs and objectives of Company X that will serve as the basic guidelines for successful implementation and use of the system.

1. Increase the number of clients and maximize profits: One of the main goals is to attract new clients and strengthen your clientele. Company X aims to use the features of Microsoft Dynamics 365 to identify leads, communicate effectively with them, and follow up on their interest. This will ensure not only an increase in the number of clients but also the maximization of every business opportunity and profit maximization.
2. Extending demand throughout the calendar year: Company X aims not only to keep demand high during the school year but also outside of it. Implementing Microsoft Dynamics 365 will enable the company to better plan and execute marketing campaigns, specialized events, and courses outside of the standard school term. This will lead to a more balanced workload and long-term revenue stability.
3. Personalizing learning and increasing student interest: Another goal is to increase the efficiency and transparency of internal communication between teams. Microsoft Dynamics 365 will be used to create a single point for information sharing, planning and project tracking. This will improve coordination between the different departments, allowing for a quick response to current needs.
4. Improving internal communication and efficiency: Another goal is to increase the efficiency and transparency of internal communication between teams. Microsoft Dynamics 365 will be used to create a single point for information sharing, planning, and project tracking. This will improve coordination between the different departments, allowing for a quick response to current needs.

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5. Ensuring long-term growth and sustainability: Company X is committed to the long-term growth and sustainability of its business. The implementation of Microsoft Dynamics 365 aims to strengthen processes that will lead to long-term development and enable the company to respond flexibly to changing market and client needs.
6. The identification of these key needs and objectives serves as the basic reference point for the subsequent implementation of Microsoft Dynamics 365. This will ensure that the system is fully aligned with the strategic interests and needs of Company X, thus serving as a tool for achieving sustained growth, competitiveness, and excellence in the education market.

Implementation process

The process of implementing Microsoft Dynamics 365 at Company X has been carefully designed and structured to ensure that it runs smoothly and maximizes the benefits of this innovative technology. The following steps illustrate the proposed implementation process and the involvement of all relevant actors:

1. Analysis of needs and goals: The first step is a thorough analysis of the needs and goals of Company X. Based on the identified needs, key features and modules of Microsoft Dynamics 365 are defined that will best fit the company's strategy.
2. Implementation planning: Based on the analysis, a detailed implementation plan is developed. The deadlines, responsibilities, and objectives of each phase of implementation are set out. The plan also includes basic preliminary training for key staff.
3. Configuration and customization: The following is the configuration and customization phase of Microsoft Dynamics 365 according to the specific needs of Company X. Modules are set up for client management, course scheduling, results tracking, and other relevant processes.
4. Implementation and training: During this phase, the actual implementation of the system into the existing infrastructure of Company X is carried out. At the same time, the employees involved are trained in its correct use and functionalities.
5. Testing and debugging: After implementation, there is a testing phase where all the system functions are checked and possible deficiencies are detected. Based on the testing, the necessary adjustments are then made.
6. Deployment and start-up: After successful testing, the system is ready for deployment. The commencement of the system's full operation marks the initiation of its practical use across all pertinent areas of the company.
7. Monitoring and optimization: After the system is launched, its functioning and efficiency are continuously monitored. Based on the data obtained, optimizations and adjustments are made to achieve the best result and utilization.

The entire Microsoft Dynamics 365 implementation process at Company X is managed with the participation of technology experts and key internal staff. A carefully structured process and regular communication between all stakeholders will ensure that the implementation is efficient, smooth, and produces maximum output.

Evaluation

The implementation of Microsoft Dynamics 365 at Company X can be expected to deliver a number of significant results and benefits that will impact its operations, efficiency, and overall competitiveness. The following sections focus on the assessment of the specific intended results and put into context how the system will be reflected at different levels of the organization:

1. Increased efficiency and productivity: the implementation of Microsoft Dynamics 365 should lead to a significant increase in efficiency and productivity within Company X. With a centralized system for managing clients, scheduling courses, and monitoring results, staff should be able to allocate their time more efficiently and minimize manual administrative work.
2. Improving the customer experience: Dynamics 365 should bring a better customer experience to the company. Through precise monitoring of customer interactions, personalized approaches, and quick responses to their needs, the relationship with existing clients is expected to be strengthened, and more clients are expected to be attracted.
3. Maximising potential: The implementation of Dynamics 365 is expected to enable Company X to fully leverage the potential of its employees and resources. Effective course planning and customization of offerings based on data analytics should increase utilization and profitability for the organization.
4. Continuous demand: Thanks to the flexibility and scalability of the system, Company X should achieve continuous demand for its services beyond the school year, leading to greater revenue stability and a more efficient use of resources.
5. Achieving strategic goals: The implementation of Microsoft Dynamics 365 should be a key factor in achieving the strategic goals of Company X. This is expected to strengthen the company's position in the tutoring and language education markets and increase its competitiveness.

Overall, the implementation of Microsoft Dynamics 365 at Company X is expected to lead to positive results and significant benefits. Increased efficiency, an improved customer experience, optimal use of resources, and the achievement of strategic goals will be key factors that will lead to improved overall operations and the competitiveness of the organization.

III. Conclusion

The main objective of this paper was to examine the practical use of the customer relationship management (CRM) model in a selected company and to propose a process for implementing Microsoft Dynamics 365. This analysis focused on the key features and benefits of the system, identifying its potential to impact business growth, increase customer satisfaction, and improve the efficiency of internal operations due to its ability to integrate customer relationship management (CRM) and enterprise resource planning (ERP) functions.

For the purposes of this paper and to explore how this technology can be applied to a specific business context, Company X, a company specializing in one-to-one tutoring, was selected. Its specific needs and goals include increasing client numbers and maximizing profits, expanding demand throughout the calendar year, personalizing instruction and increasing student interest, improving internal communication and efficiency, and ensuring long-term growth and sustainability.

Taking into account the specific situation of this company, an implementation system was designed. After successful implementation, Microsoft Dynamics 365 can be expected to bring the company increased efficiency and productivity, an improved customer experience, maximum use of employee potential and available resources, continuous demand, and the achievement of strategic goals. These aspects will be key factors in improving the overall operations and competitiveness of the organization.

As part of the recommendations for further development, the company should maintain regular contact with the system provider to be able to respond quickly to new features and updates. It is also important to continuously raise awareness among all employees of the possibilities offered by the system and encourage their active use. Continuous monitoring of changes in digital

technologies and their application to the corporate environment is also a significant factor. In this way, Company X will be able to maintain its competitiveness and provide high-quality services in the long term.

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