

A Unified CRM Built for Growth

Enabling connected sales, real-time insight, and digital integration

The Challenge

As part of a broader IT modernization initiative spanning APIs, website infrastructure, and data architecture, the client identified their legacy, on-premise Microsoft Dynamics CRM as a growing constraint. Sales teams relied heavily on Excel and disconnected CRM instances, resulting in fragmented workflows, inconsistent data, and limited visibility into performance.

The business needed a centralized, cloud-based CRM that could unify sales operations and performance tracking and integrate seamlessly with digital platforms.

The Solution

The Intersect Group led a full migration from the client's on-premise Dynamics environment to Microsoft Dynamics 365 in the cloud.

A cross-functional delivery team, including Dynamics 365 Product Owners, Product Managers, Business Process Training Consultants, and Cloud Solution Delivery Leads, managed both technical execution and organizational change.

The solution consolidated CRM data from more than 250 retail locations, integrated historical sales documentation, and aligned Dynamics 365 with the client's existing data lake and data models. API-level integrations connected Dynamics 365 with the digital storefront, enabling support for customer transactions, appointment scheduling, and other critical front-end experiences.

The Impact



Centralized CRM access across 250+ retail locations



Real-time sales data synchronization via Dynamics 365 API integrations



Centralized sales workflows powered by a single CRM platform



Clear, real-time insight into sales performance and customer activity



A flexible foundation for future automation, analytics, and ecommerce growth