**Case Study: CRM Cloud Migration with AI & Copilot Enablement in Financial Services**

Challenge  
A leading financial services firm relied on an aging on-premise Microsoft Dynamics CRM, limiting scalability, data security, and innovation potential. To modernize client management, strengthen compliance, and unlock AI-driven insights, the firm needed a seamless migration to Dynamics 365 Online.

**Solution**  
The Orbitz Technology team successfully led the end-to-end migration of Microsoft Dynamics CRM from on-premise to Dynamics 365 Online, delivering a secure, scalable, and modern platform while aligning business, technology, and compliance stakeholders.

**Key achievements included:**

* Governance & Reporting – Facilitated monthly Steering Committee meetings and provided transparent executive reporting.
* Test Transformation – Modernized testing by moving from Excel to Jira Xray, ensuring efficiency and compliance traceability.
* Regulatory Compliance – Collaborated with InfoSec and Deloitte to meet stringent financial security and infrastructure requirements.
* Agile Delivery – Partnered with system integration teams using Azure DevOps for backlog management, bug triage, and issue resolution.
* AI & Copilot Roadmap – Researched and planned adoption of AI and Microsoft Copilot features within Dynamics 365 to enable predictive customer insights, automate workflows, and enhance financial advisor productivity.
* Change Adoption – Delivered training, newsletters, and communications to drive user adoption and trust in the new platform and upcoming AI capabilities.

**Impact**  
The migration not only modernized the CRM platform but also laid the foundation for AI-powered client engagement. With Copilot and AI capabilities integrated into Dynamics 365, financial advisors gained smarter recommendations, automated reporting, and enhanced client interaction tools. This transformation improved compliance readiness, operational efficiency, and positioned the firm for next-generation, data-driven customer relationship management in a highly regulated industry.

**Case Study: Global Marketing Tech Transformation in the Technology Industry**

**Challenge**  
A global technology leader needed to streamline its **email marketing and account-based marketing (ABM)** processes, which were slowed by manual approvals, inconsistent design standards, and complex agency handoffs. Additionally, the organization required stronger privacy and governance controls to meet global data protection expectations while scaling marketing programs across multiple regions.

**Solution**  
The Orbitz Technology team led the **implementation and delivery of Stensul (Email Creation Platform) and Folloze (ABM Engagement Platform)**, enhancing speed, compliance, and design consistency across global business teams.

Key achievements included:

* **Faster Campaign Execution** – Implemented Stensul globally, reducing email campaign go-to-market time by **50%** and introducing efficiencies in layout approval and agency handoff.
* **Governance & Privacy** – Partnered with the data privacy team to implement governance guardrails in Folloze, ensuring compliance with global privacy standards in account-based marketing campaigns.
* **Custom Development** – Designed an integrated Stensul–Eloqua solution to support **internal communications**, enabling marketers to repurpose approved templates for employee-facing communications.
* **Design Enforcement** – Collaborated with the design team to ensure consistent brand and design principles across Stensul, Eloqua, and Folloze platforms.
* **Partner Marketing Expansion** – Supported partner marketing program managers to roll out the Stensul-based email solution to **Cisco partner teams across North America**, ensuring adoption and alignment with brand best practices.

**Impact**  
The program delivered **significant marketing efficiency gains**—cutting time-to-market in half, enforcing global brand consistency, and embedding privacy compliance across ABM campaigns. By integrating Stensul, Eloqua, and Folloze, the technology firm enhanced both **external customer engagement and internal communication workflows**, driving greater scalability and control over global marketing operations.

**Case Study: CRM Cloud Transformation for Commercial Real Estate**

**Challenge**  
A leading commercial real estate firm relied on legacy CRM tools that lacked scalability, mobility, and integration with core financial systems. Sales teams across the Americas faced inefficiencies managing leads, generating quotes, and standardizing processes across diverse regional markets. The firm required a CRM modernization initiative that could unify processes, integrate with back-office systems, and support the speed and transparency demanded in real estate transactions.

**Solution**  
The Orbitz Technology team led the **migration of Microsoft Dynamics CRM to the cloud** and delivered a **custom CRM application for the Americas Markets Teams**, providing a scalable and feature-rich platform tailored to the firm’s needs.

Key achievements included:

* **CRM Cloud Migration** – Successfully migrated Dynamics CRM from on-premise to the cloud, unlocking the platform’s latest features and ensuring flexibility for future growth.
* **Custom CRM App Development** – Designed and delivered a custom Dynamics CRM-based application integrated with **PeopleSoft** to support the **end-to-end quoting process** for real estate leads, improving response speed and accuracy for client opportunities.
* **Sales Process Standardization** – Collaborated with North American business leaders to define a **standardized sales process** within the CRM, while accommodating **unique regional variations** across different markets.
* **User-Centric Delivery** – Ensured business alignment through regular stakeholder engagement, requirements workshops, and platform demos, driving smooth adoption across regional sales teams.

**Impact**  
The initiative provided the commercial real estate firm with a **modernized, cloud-enabled CRM platform** that streamlined lead-to-quote cycle times, ensured **greater process consistency across regional markets**, and enhanced **integration with financial systems**. With a unified platform, sales teams gained improved visibility into pipelines, faster quote generation, and the ability to scale operations in a competitive real estate environment.

**Case Study: CRM & Service Cloud Transformation in the Heavy Equipment Industry**

**Challenge**  
A global heavy equipment manufacturer serving the **Agriculture (AG) and Construction Equipment (CE) markets** across North America needed to modernize its customer engagement strategy. The firm relied on fragmented CRM processes, inconsistent customer data, and outsourced call center operations, leading to **high call handling times (CHT)** and increased operational costs. Additionally, siloed marketing functions made it difficult to engage customers consistently across sales, service, and marketing channels.

**Solution**  
The Orbitz Technology team delivered a comprehensive transformation program to modernize CRM, digitize service operations, and optimize marketing automation for the NAFTA AG and CE business units.

Key achievements included:

* **Unified CRM & Marketing Oversight** – Took ownership of all CRM and marketing automation needs for AG and CE brands, ensuring business-wide consistency and scalability.
* **Call Center Modernization** – Scoped and implemented a **Service Cloud–based Call Center solution** for **Breakdown Assistance**, improving real-time visibility into cases and faster resolution for customers.
* **Marketing Automation Enablement** – Led the **selection and onboarding of a Marketing Automation platform**, enabling personalized campaigns and stronger dealer and customer engagement.
* **Customer Data Standardization** – Defined and executed a **re-platforming of the customer database** with enhanced deduplication and standardization rules, improving data quality for sales, service, and marketing teams.
* **In-sourced Call Center Operations** – Transitioned call center support back in-house with a **Microsoft Dynamics solution**, delivering a **20% reduction in Call Handling Time (CHT)** and **20% annual cost savings (YOY)**.

**Impact**  
The program delivered measurable business value:

* Customers benefited from **faster roadside and breakdown assistance**, improving satisfaction and loyalty.
* Dealers and field representatives gained access to **clean, standardized customer data**, enabling more effective campaigns and upsell opportunities.
* The business achieved **20% YOY operational cost savings** while improving customer support efficiency.
* By integrating marketing automation with CRM, the company established a **strong digital foundation** to expand customer engagement and streamline operations across the heavy equipment lifecycle.