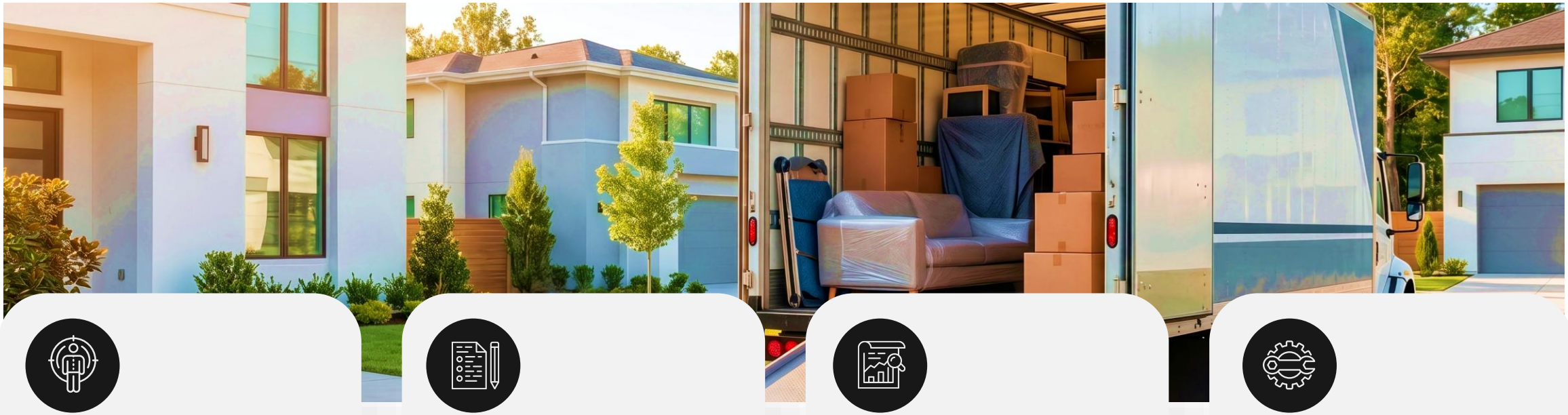
Synoptek

Case Study

Modernizing Legacy CRM to Streamline Sales and Marketing with Dynamics 365 Customer Engagement



Customer Overview



Customer

A moving and relocation company

Profile

The largest independent moving companies in the United States, offering residential and commercial relocation and logistics services

Industry

Transportation, Logistics, and Supply Chain

Services

On-premises Dynamics CRM to Dynamics 365 Customer Engagement Migration

Business Need

The client’s marketing team already worked in Dynamics 365 Customer Engagement in the cloud, while Sales was still on an on-premises CRM. The client wanted to bring sales onto the same platform as part of its wider digital transformation.

What it needed:

- A single source of truth for accounts, contacts, leads, and opportunities, with a smooth lead handover from marketing to sales and closed-loop reporting.
- Less infrastructure and upgrade overhead, plus automatic upgrades, stronger security, better scalability, and a lower cost of ownership.
- A shared security model, clean migrated data, a review of existing customizations, integrations rebuilt, and the right licensing.
- Better-aligned sales and marketing teams, more accurate forecasting, more productive sellers, and a platform ready for growth.



Solution and Approach

Synoptek worked closely with the client's internal technical team, with clear ownership on both sides. The project ran on a hybrid agile approach: 6 weeks of discovery and design, 7 sprints, a production release with data migration, and 2 weeks of hyper-care.

Core Sales Migration

Synoptek moved the core sales capabilities from Dynamics CRM on-premises 9.1 to Dynamics 365 Sales. This covered leads, opportunities, accounts, contacts, quotes, campaigns, and activities, along with custom entities, fields, and forms.

Secure, Role-based Access

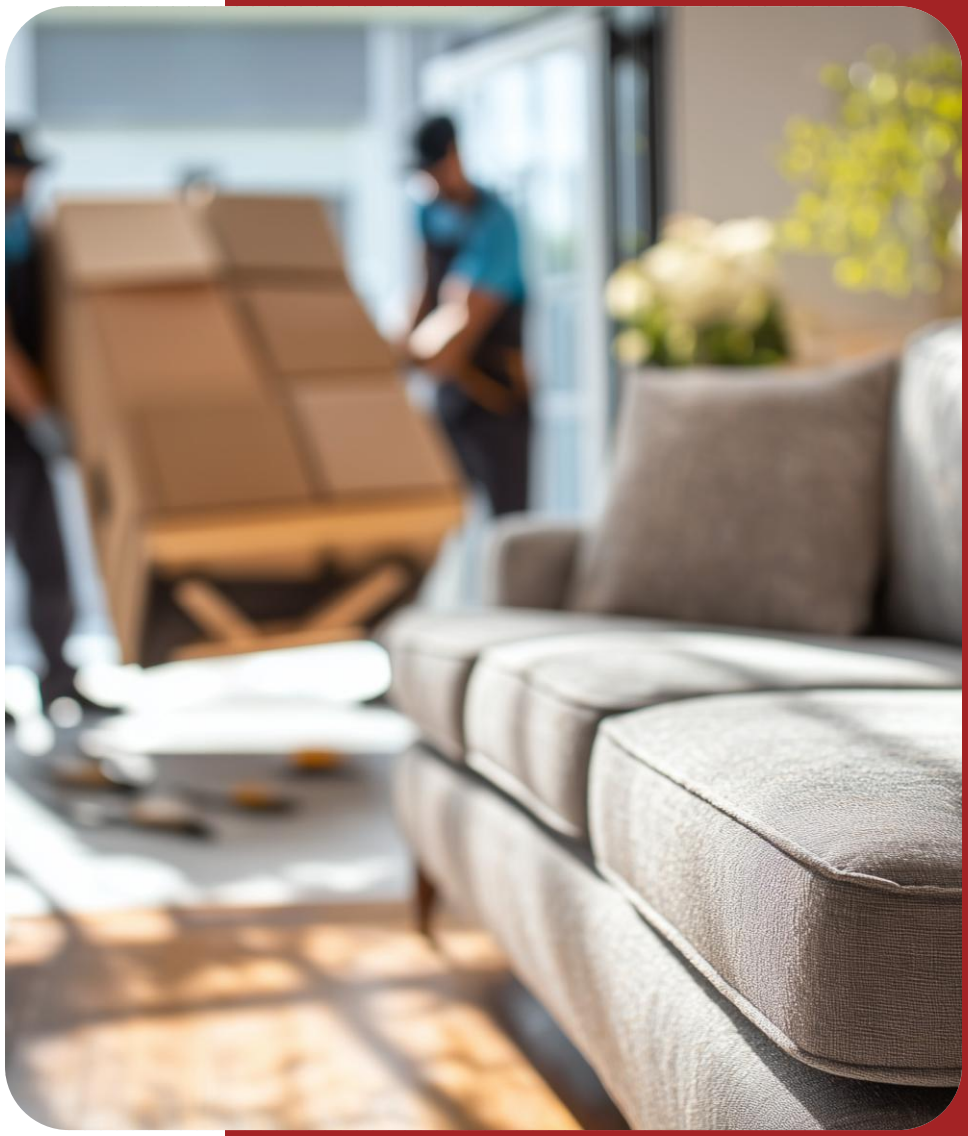
A structure of business units, sales teams, and role-based security gives each sales function the right level of access.

Familiar Processes, Rebuilt

Key processes from the legacy system were recreated, including Business Process Flows, Account and Contact hierarchy, timeline activity roll-up, navigation, and quote configurations.

End-to-end Validation

UAT and functional testing covered Lead-to-Opportunity-to-Quote processing, security, contact numbering, duplicate detection, lead routing, reports, dashboards, and views.



Solution and Approach

Smart Lead Routing

Automated routing uses configurable queues and business rules to send each lead to the right team. It is supported by:

- Queue membership and open-lead tracking
- Push-back logic and reconciliation
- Routing explanations and availability checks
- Fallback handling for leads that match no rule
- Admin views and dashboards for visibility

Timely Automated Alerts

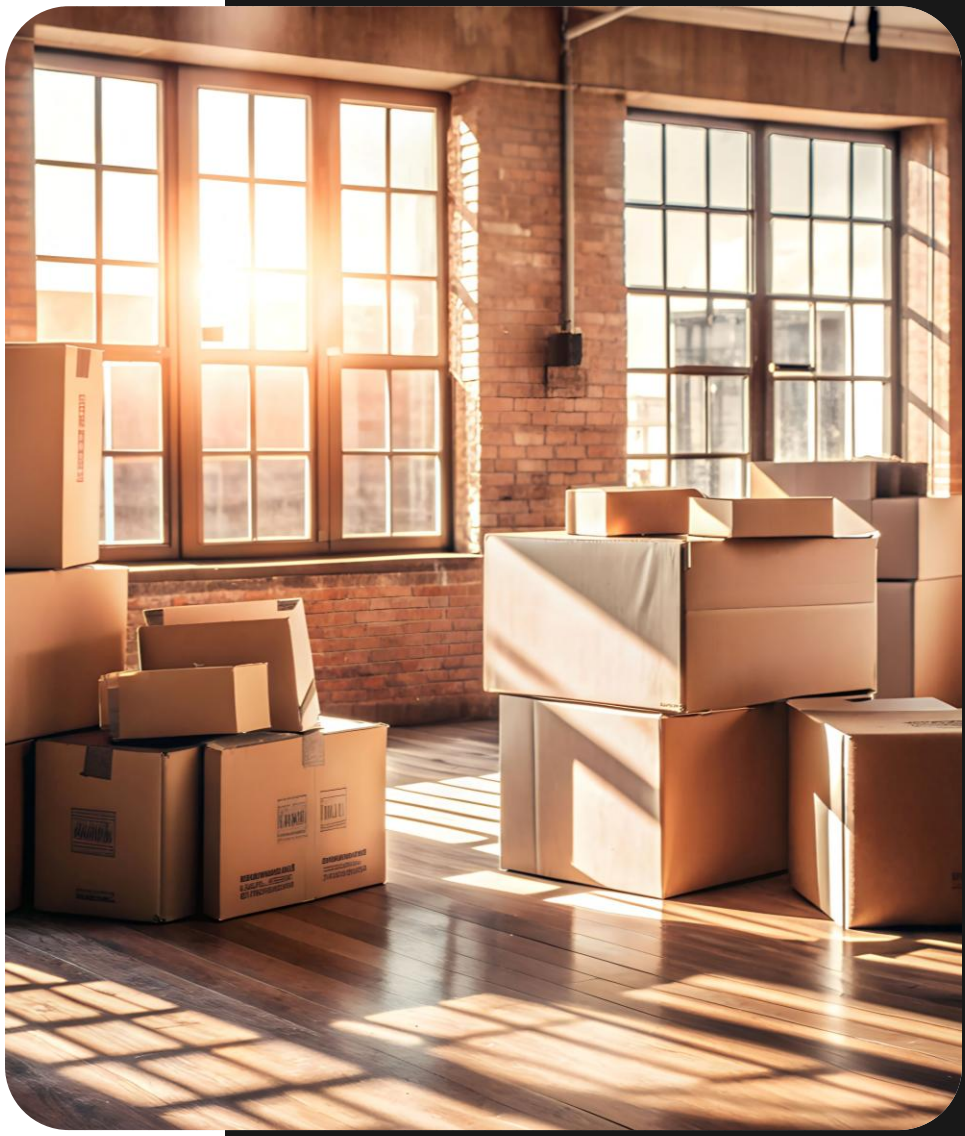
Power Automate notifies the team about new leads, bookings, stats leads, and lead-assignment errors, so nothing slips through.

Cleaner Customer Data

Controlled Customer Number generation, internal email-domain validation, and duplicate detection keep customer records consistent.

Better Visibility

Migrated and improved sales views and dashboards, so users and administrators can see records, lead distribution, queue assignments, and workload.



Business Benefits

The client now has one cloud platform for leads, opportunities, accounts, contacts, and quotes backed by role-based security, automated routing, queue-based workload distribution, notifications, dashboards, and data-quality controls. With the move to Dynamics 365 Sales, the client now runs a smarter, faster, and more connected sales operation, with these results:

A Better User Experience

Streamlined sales processes on a modern cloud CRM

Less Manual Work

Automated, queue-based lead routing across Indian Sales, Outside Sales, and Open Lead queues

Stronger Security

Role-based access, Business Units and Sales Teams

Higher Data Quality

Duplicate detection, email validation and controlled customer numbers

Sharper Visibility

Dashboards, views, and workload tracking

A Fuller Customer Picture

Consolidated Account and Contact activity

Faster Follow-up

Automated alerts for leads, bookings, stale leads, and errors

Higher Release Quality

Structured UAT, Quality Control Reports, release memos and deployment planning

About Synoptek

Synoptek is the first IT Managed Experience Provider (MxP™), delivering AI-enabled automation, strategic modernization, and experience-led outcomes. Its services span Cloud and Agile Infrastructure, Business Applications and Platform Development, Customer and Employee Experience, and Cybersecurity. With a business-first approach and a global delivery model, Synoptek helps organizations optimize operations, accelerate transformation, and achieve measurable results—guided by a culture rooted in growth, ownership, inclusiveness, and philanthropy.

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