

## A Strategic Roadmap for Growth

Engaging Advisory Services to Set the Vision for a Successful Ground to Cloud CRM Migration and Future Growth

### SPECIFICATIONS

#### INDUSTRY

- Financial Services

#### DRIVERS

- Unified and streamlined CRM platform
- Single source of truth for data and reporting
- Data-driven insights
- Efficiency, agility, growth

#### PROJECT TYPE

- Advisory
- Migration
- Implementation

#### PRODUCTS

- Hitachi Solutions Advisory Services
- Microsoft Dynamics 365 Customer Engagement
- Hitachi Solutions Change Enablement
- Hitachi Unified Data Accelerator

#### DEPLOYED

- North America

*To elevate their CRM platform from a glorified rolodex to an integrated, enterprise-wide tool for productivity and growth, this large financial services organization knew Microsoft Dynamics 365 Customer Engagement was the cloud solution they needed. To help visualize and implement the future environment, drive maximum value, and accelerate adoption, they turned to Hitachi Solutions for expert advice and strategic planning.*

### Challenge

This member-owned financial services company was looking to modernize their CRM solution to enhance and grow the business. The existing on-prem environment was not being used to its fullest potential and connected to other outdated and homegrown systems. This resulted in a lack of data transparency, an increase in time-consuming manual tasks and processes, and costly technical debt.

Without customer data in an easy to access, centralized system, the field and home office did not always have access to the most current information. This hindered the sales team from demonstrating value and expanding the member base, as well as hampered leadership from making accurate and timely decisions. The client's current CRM system utilized minimal functionality, lending itself to be more of a rolodex contact list, holding them back from being innovative, scalable, and achieving their corporate growth goals.

The organization knew they needed to change the way they were using their CRM to be more successful in today's competitive market. This meant modernizing and moving to the cloud with Microsoft Dynamics 365 Customer Engagement (CE). What they couldn't do on their own was envision the future state — what the solution should look like; how it should work; and what the full impact would be on employees, customers, and the business. They turned to Hitachi Solutions for help.

## Solution

As a long-time Microsoft partner, Hitachi Solutions had the industry and technology experience the organization was looking for to implement the new Microsoft Dynamics 365 CE solution. But what really sealed the deal for them was our end-to-end Advisory Services that allow us to guide, advise, simplify, and support their business transformation and modernization initiatives.

Beyond upgrading the technology, the organization wanted to integrate people and processes into the solution — and change the way they work — to improve the overall experience and help the entire organization be more efficient, agile, and productive. To do this, we needed to align on the right problems to be solved and develop a future vision that incorporated the impact across people, process, and technology and resulted in sustainable outcomes from their investment.

- Our team started with a ground to cloud assessment and future state envisioning to understand their vision and help determine their maturity and readiness for digital change.
- Then through a series of on-site workshops, Hitachi Solutions, together with stakeholders from across the organization, identified and prioritized their challenges, set goals and expectations, and determined value and impact. This in-depth planning resulted in a comprehensive strategy and actionable roadmap for
- By having the client team fast forward in time months and years ahead, we were able to give them clarity, identify tangible objectives, and help them visualize their ideal future state. This collaboration provided cross-business unit alignment and buy-in on the plan ahead.
- Through enablement readiness and communications, our team also helped the organization's stakeholders determine the best post-implementation program to support optimized performance and accelerate user acceptance and adoption.

Once everyone was on the same page for the future vision, opportunities, and desired outcomes, we were able to get tactical about what it would take to achieve their objectives. Hitachi Solutions' delivery team designed the functional and business requirements for the new Microsoft D365 environment and then, through our Unified Framework development methodology, implemented the solution with speed, quality, and consistency.

Connecting strategy through to execution, the Hitachi Solutions Advisory Services team stayed engaged throughout the whole project — all the time keeping the end goal in mind while engaging in overall end-user experience and adoption.



## Benefits

With Microsoft Dynamics 365 CE and Hitachi Solutions Advisory Services, this customer has completely reimagined how they leverage a system that works for them. Tasks and processes are automated, and data is unified and accessible by everyone who needs it.

Moving from an outdated contact system, they now have an integrated, collaborative, and centralized solution that provides a single source of truth for the company and is a true competitive differentiator for them. With information available at the ready, they can leverage it to gain valuable insights and make more informed business decisions that help improve the overall sales, service, and operations experiences.

By engaging the Hitachi Solutions Advisory Services team from the beginning, the organization was able to visualize the new way they wanted to work, determine the goals they wanted to achieve, get everyone on board, and put together a strategy and tactical plan to meet their growth needs and maximize value — for now and into the future.

## Future

Through this process, we have become the organization's trusted advisor for digital transformation. For this project, the Advisory Services team will carry on implementing the developed roadmap, which includes migrating data sources to Dynamics 365 and adding Hitachi Solutions IP — such as the Hitachi Unified Data Accelerator — to continue to automate, streamline, and simplify their business.

The Advisory Services team has identified a number of opportunities for on-going improvement that will help accelerate the company's digital efforts. We look forward to continuing to lead them through this transformation.

[Contact us](#) to learn how we can help you!

Hitachi Solutions

[global.hitachi-solutions.com](https://global.hitachi-solutions.com)