



Accelerate Financial Services Transformation with Microsoft Dynamics 365

Location: **USA**

Business Scenario:

A financial services company (Accounting and Consulting Firm) sought to undergo digital transformation to improve data management and build valuable customer relationships. They faced the challenge of needing interactive and intuitive tools to achieve these goals effectively.

Solution:

The company chose Microsoft Dynamics 365 for its interactive, intuitive, and engaging UI in conversation intelligence and chose inoday to customize and implement it. By leveraging the core capabilities of Dynamics 365, they aim to strengthen customer relationships and expedite the sales process.

Results:

- » **Enhanced Customer Relationships:** Dynamics 365's key insights enabled the company to better understand customer needs and preferences, leading to stronger and more personalized relationships.
- » **Faster Deal Closures:** By utilizing the interactive UI and conversation intelligence, the company was able to streamline the sales process, resulting in faster deal closures and increased revenue.
- » **Multicompany and Multicurrency Scenario:** Adopting Microsoft dynamics helped the organization to maintain a large number of customer accounting systems with consolidated dashboards compliance and statutory requirements.

Through the successful implementation of Microsoft Dynamics 365 and the adoption of Azure, the financial services company achieved its digital transformation goals, driving improved data management and fostering valuable customer relationships.