



Charter Global **CASE STUDY** – Transforming Sales Productivity with Dynamics CRM and Microsoft Copilot

Client Overview

A growing enterprise focused on digital transformation and technology solutions with a wide range of service offerings and a diverse client base needed a centralized, secure CRM system to unify sales operations. With a Microsoft-based infrastructure, the client sought a platform that could integrate communication, analytics, and automation while scaling with future business needs.

Business Challenges

- Legacy CRM (HubSpot) lacked native integration with Microsoft tools like Teams, Outlook, and Power BI.
- Manual workflows slowed down sales processes and campaign execution.
- Dashboards were fragmented and required external tools for meaningful insights.
- Migration from HubSpot involved complex custom fields and historical data.
- Duplicate records and inconsistent data structures impacted reporting and decision-making.
- Inadequate role-based access created data security and governance challenges.

Charter Global's Solution

Charter Global implemented Microsoft Dynamics CRM to provide an intelligent, integrated, and scalable sales platform. Key actions included:

- **Comprehensive CRM Implementation:** Built Dev, Test, and Production environments, customized entities and views, and imported clean, validated data from HubSpot.
- **Microsoft Ecosystem Integration:** Seamlessly connected Teams for calls and meetings, Outlook for emails, SharePoint for document storage, and Power BI for real-time dashboards.
- **AI and Automation:** Integrated Microsoft Copilot for smart suggestions, summaries, and sales insights. Designed Power Automate flows to streamline approvals, alerts, follow-ups, and daily campaign triggers.
- **Advanced Communication Tools:** Embedded Teams calling with recording and transcript capture directly into CRM, reducing reliance on third-party tools.
- **Future-Ready Enhancements:** Added LinkedIn Sales Navigator for lead sourcing, implemented Project Operations for contract workflows with DocuSign and SharePoint, and began development of a mobile CRM app and WhatsApp Business API integration.

Business Impact

- **Enhanced Productivity:** Sales teams worked faster with unified tools, smart automation, and AI-driven assistance.
- **Increased Collaboration:** Native integration of communication tools created a seamless, centralized workspace.
- **Improved Data Governance:** Duplicate detection and role-based access ensured accurate, secure, and structured data usage.
- **Smarter Decisions:** Leadership leveraged real-time KPIs via Power BI and Dynamics dashboards.
- **Scalable Platform:** The CRM is now equipped to support field service, mobile access, and customer engagement innovations.

Why Charter Global

Charter Global was selected for its deep expertise in CRM modernization, Microsoft ecosystem alignment, and agile implementation approach. The team delivered:

- Strategic CRM planning and customization aligned to business goals
- Expert integration across Microsoft 365, Power Platform, and Dynamics apps
- Scalable automation, AI support, and clean data practices
- A future-ready roadmap tailored to evolving enterprise needs