Leveraging Power Platform with Dynamics CRM

Unlock greater business value by combining Microsoft Dynamics CRM with Power Platform capabilities. This presentation shows how to transform your CRM from a system of record into an engine for automation, analytics, and innovation.

by Kimberly Wiethoff

Power BI: Turning CRM Data into Visual Insights

100%

Real-time Data

Live dashboards directly connected to your CRM

75%

Faster Decisions

Reduced time to insight with visual analytics

60%

User Adoption

Increased engagement with self-service reporting

Transform your treasure trove of customer data into actionable insights. Easy drag-and-drop visuals help non-technical users explore trends independently.

Power Automate: Eliminating Manual Bottlenecks

Trigger Event

New lead created or case opened in CRM

Automated Process

Route approvals, send notifications, update records

Completion

Tasks finished without manual intervention

Eliminate repetitive tasks that slow down your team. Set triggers based on CRM events to route leads, send follow-ups, or escalate cases automatically.

Power Apps: Custom Interfaces Without Heavy Development

Role-specific Apps

Create tailored experiences for field agents, service techs, and sales teams. Show only what each user needs to see.

Mobile-friendly Forms

Build responsive interfaces that work anywhere. Capture data on the go with simplified entry screens.

Rapid Development

Deliver solutions in days or weeks instead of months. Use low-code tools to accelerate your timeline.

Not everyone needs the full CRM interface. Create streamlined, task-specific applications that connect directly to your Dynamics data.

Project Management Advantages

Greater Agility

Adapt workflows as business needs evolve

Higher Satisfaction

Deliver customized experiences for all stakeholders

Faster Delivery

Accelerate implementation with low-code tools

Lower Costs

Reduce development expenses significantly

The Power Platform transforms how you manage CRM projects. Business users can now contribute to solution building without extensive development resources.
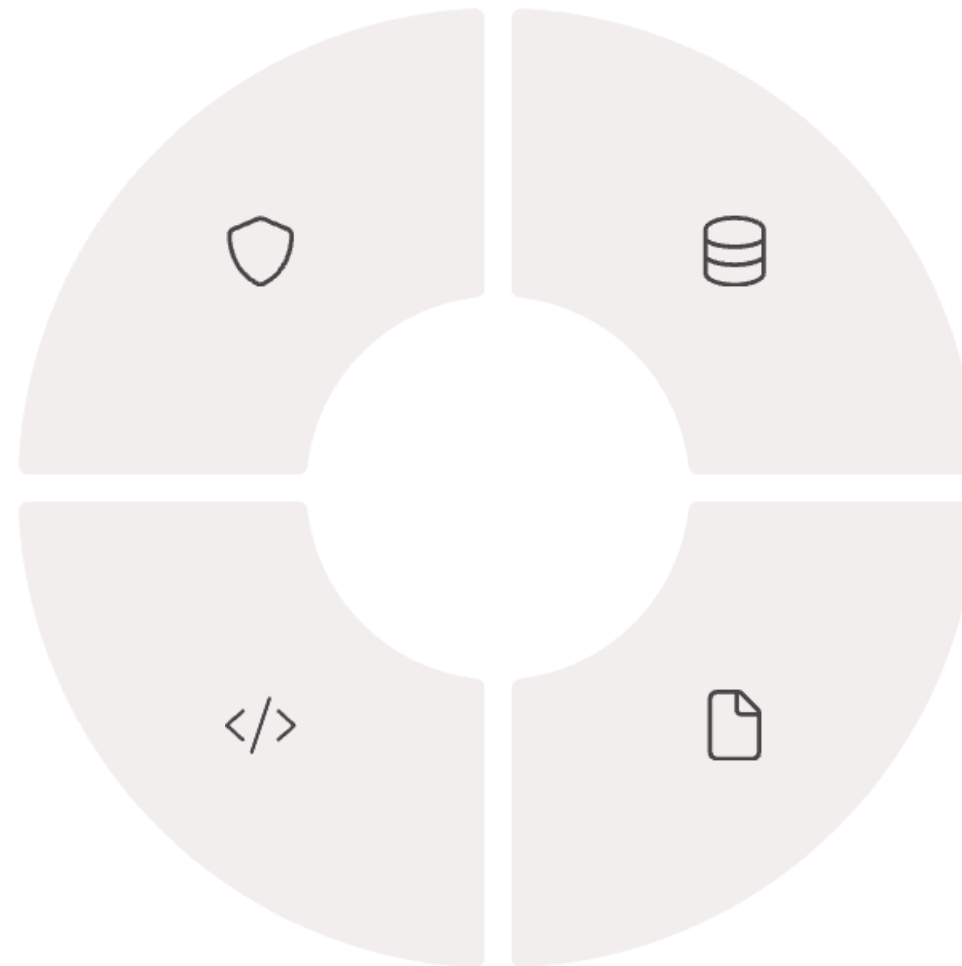
Governance and Security Framework

Access Controls

Define who can use and modify each component

Data Policies

Establish rules for data handling and retention

Development Standards

Set guidelines for testing and deployment

Documentation

Create standards for naming and documentation

Innovation requires guardrails. Establish clear governance early to enable controlled growth without creating technical debt or security risks.

Implementation Success Factors

◎ **Define Clear Objectives**

Start with specific business problems you need to solve

👥 **Involve End Users Early**

Gather feedback throughout the development process

🎓 **Invest in Training**

Build internal capability through hands-on workshops

📈 **Measure and Iterate**

Track usage and continuously improve your solutions

Follow these steps to ensure your Power Platform implementation delivers real business value. Start small and scale based on proven success.

Real-World Integration Examples

Sales Pipeline Automation

Automatically route leads based on value and territory. Send personalized follow-ups without manual work.

Field Service Optimization

Create mobile apps for technicians to access case history and document work. Sync everything back to CRM instantly.

Customer Onboarding Workflow

Build guided processes that ensure consistent customer setup. Track progress with visual dashboards for managers.

Executive Intelligence Hub

Deliver cross-functional insights through interactive reports. Connect sales, service, and marketing data in one view.

These examples show how organizations combine Dynamics CRM with Power Platform capabilities to solve real business challenges.

Getting Started: Your First 90 Days

Days 1–30: Assessment

Identify high-value opportunities. Document current pain points and process gaps.

Days 31–60: Build

Develop initial dashboards, workflows, and apps. Test with a small user group.

Days 61–90: Launch

Roll out solutions to wider audience. Gather feedback and measure impact.

Start your journey with this practical roadmap. Focus on delivering quick wins while building the foundation for long-term success.

The Connected Future of CRM

AI-Powered Insights

Leverage predictive analytics to anticipate customer needs and automate complex decisions.

Extensible Platform

Continuously add capabilities as your business grows. Connect to new systems without rebuilding.
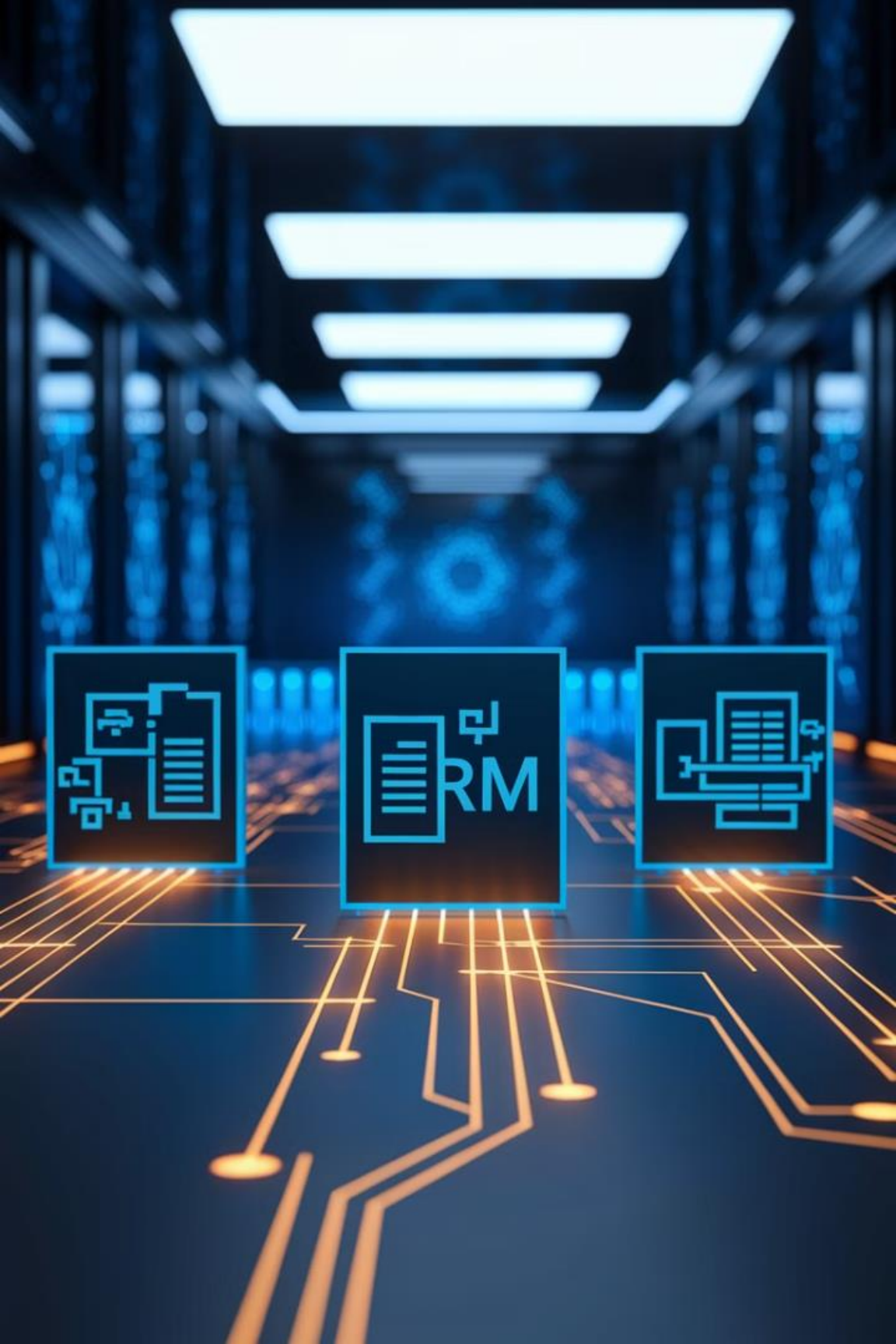
Democratized Innovation

Enable business teams to solve their own problems with minimal IT intervention.

The future of CRM is connected, agile, and intelligent. By embracing the Power Platform, you're positioning your organization for ongoing innovation and competitive advantage.
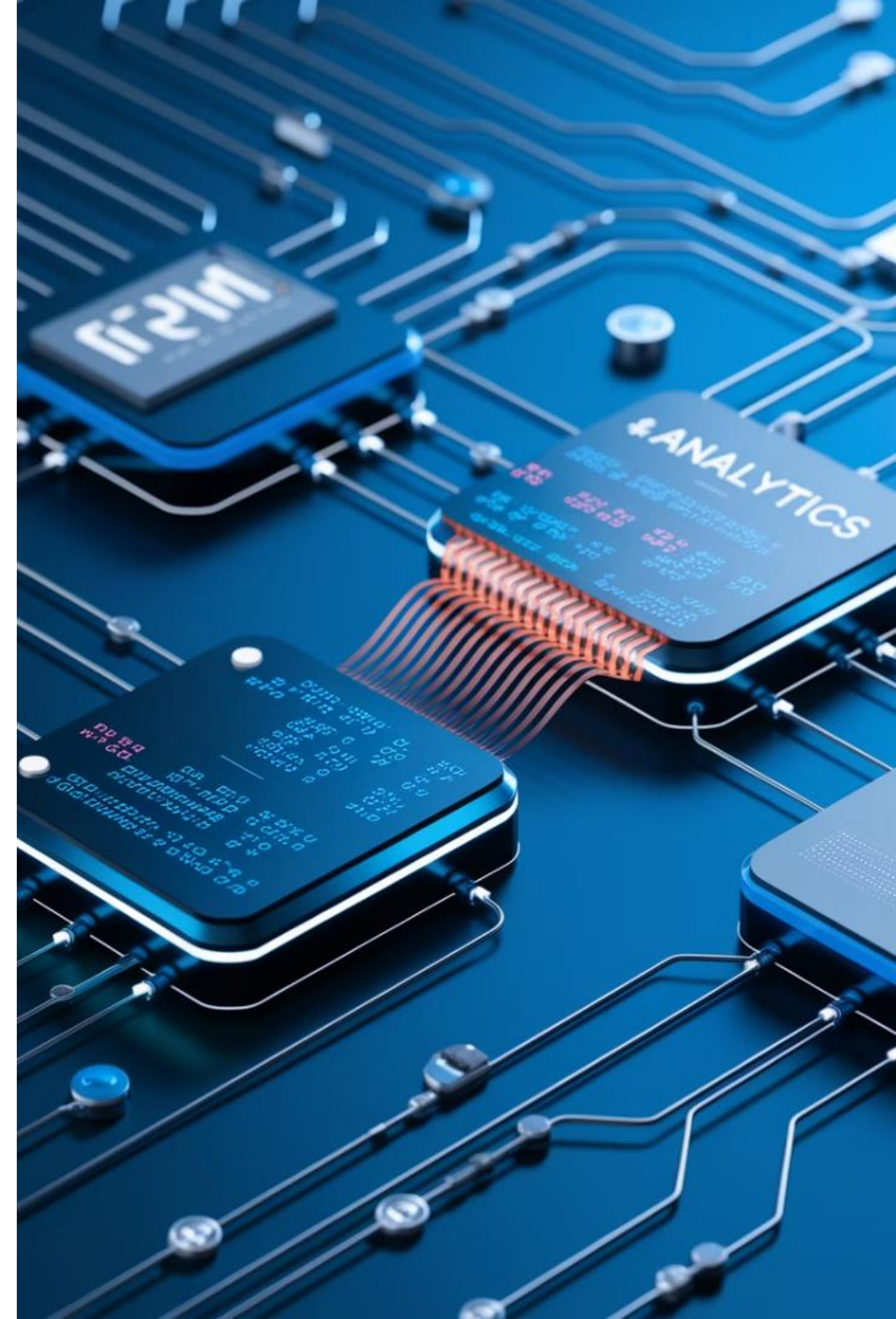
Final Thoughts

Microsoft Dynamics CRM is just the beginning. By tapping into the broader Power Platform, organizations can empower their teams, automate more intelligently, and get deeper insight from their data.

For project managers, this means delivering more value with less complexity—while staying adaptable to changing business needs.

The future of CRM is connected, agile, and intelligent—and with the Power Platform, you're already halfway there.