

EY teams
unite globally
with Dynamics
365 Sales



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– Jeremy Hallett, Global Markets Enablement Leader, Ernst & Young LLP

At Ernst & Young Global Limited (EY), building a better working world is the “North Star” for nearly 400,000 member firm employees at 700 offices in 150 countries. Through four highly integrated service lines – assurance, consulting, strategy and transactions and tax – EY plays a critical role in helping build trust and confidence in financial markets and economies around the world.

An integrated and empowering approach to building relationships

Consistent excellence and an integrated, empowering approach to building relationships with clients drive the EY client service teams. To deliver exceptional client service and help them maintain a competitive edge across markets, the EY organization needed a deeper understanding of the firm's account and opportunity data than its legacy customer relationship management (CRM) system could provide. To enable transformation, account teams wanted a fuller, clearer view of their sales pipeline, more specific tracking data to help them understand the critical business issues affecting their clients and a streamlined way to prioritize sales relationship activities and collaborate across teams to deliver the right solution at the right time for each client.

With a market-leading CRM solution, the EY organization would be able to apply the latest CRM and AI capabilities to help drive better outcomes for its clients and increased sales. Account teams will gain a more streamlined and standardized sales process, nurturing better team collaboration. And account leadership will benefit from more accurate and reliable sales forecasting, improved goal setting and more efficient resource allocation. The EY transformation story showcases how Dynamics 365 Sales can help complex, regulated, multi-national organizations inspire a unified, collaborative, customer-focused global sales capability – empowered to move business forward with a shared vision and digital toolkit.

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Dynamics 365 ensures we're connected, proactive and insightful, and the ultimate aim is to provide our clients with exceptional client service.

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Connecting a global team with an intuitive CRM

EY teams used legacy CRM as an administrative tool, separate from ongoing sales activities, so client-serving teams weren't intimately engaged with the system. By bringing administration, account management and sales activities together in one intuitive CRM platform, Microsoft Dynamics 365 Sales will be the foundation for global sales transformation at EY. EY chose Dynamics 365 to address three focus areas: connecting people, streamlining processes and embracing technology. “Our aim is to have all major countries live on Microsoft Dynamics 365 Sales as part of an integrated platform that will see around 100,000 users,” says Jeremy Hallett, EY Global Markets

Enablement Leader. “We're extremely excited about the future, and what we're doing now is building a platform that gives us the opportunity to do a host of things as technology changes.”

In late 2023, EY rolled out Dynamics 365 Sales to 3,000 users in South Africa and Singapore, and by early 2024, locations across the US and Canada went live, bringing the total to around 25,000 users. By the time the global deployment is complete, approximately 75,000 additional users will be added and enjoy enhanced functionality, flexibility to integrate third-party apps and expandability to change and grow with the firm that Dynamics 365 offers.

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The beauty of Dynamics 365 is it gives us a platform to build on in the future. We see it as a key component of our entire transformation journey, and it allows us to rapidly evolve as our business evolves.

– Kris Kutty, Global Product Manager, Ernst & Young LLP

Meeting users where they are

When EY brings new tools into its organizations, leaders consider the next generation of workers who are used to consumer interfaces. With Dynamics 365 Sales embedded in Outlook and Teams and available on mobile devices, account teams have a simpler, more reliable way to work embedded in the tools they use every day, with rich data easily accessible in a familiar, user-friendly interface. "Dynamics 365 helps our teams be more prepared and gives us more consistent visibility into the maturity of our opportunities across the sales lifecycle," says Kris Kutty, Global Product Manager, Ernst & Young LLP.

To meet users where they are, a specialized mobile app built with the low-code Power Platform puts sales tools and every bit of account and

opportunity data into client-serving professionals hands. The convenience of having these tools embedded in the flow of everyday work and available wherever users are, can't be overstated. As Kutty states, "We've brought the opportunity management process closer to where we spend our time, such as using Outlook, in Teams and on the go while on mobile." Now teams can be more productive, and account managers are empowered with deeper insights updated in real time. "Dynamics 365 plays a pivotal role in our sales relationships. We've sped up our sales cycle and now act on more quality opportunities – which results in more wins," says Sherry Martin, Director of Digital Strategy and Enablement, Ernst & Young LLP.

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An intelligent view of the sales cycle

With Dynamics 365, EY client-serving teams have a range of fully connected and integrated tools that work together to nurture sales relationships, present rich client insights and make collaboration easy – even on the go, anywhere in the world. By promoting situational awareness that leads to more personalized client outreach, the powerful CRM solution provides a solid foundation for sales excellence – and better outcomes for EY clients. “Dynamics 365 positions us to drive sales excellence, and that is our primary goal,” states Martin.

The benefits to sales teams, account managers, financial forecasters and

business planners are immense, and have made a real impact on the way EY does business. “With Dynamics 365 we’re connected, proactive and insightful and the ultimate aim is to provide our clients with exceptional client service,” says Hallett. More efficient and knowledgeable users make better decisions quicker, and ultimately are positioned to best serve their clients.

“The beauty of Dynamics 365 is it gives us a platform to build on in the future. We see it as a key component of our entire transformation journey, and it allows us to rapidly evolve as our business evolves,” says Kutu. Using a globally consistent and

streamlined sales management system, client service teams are more efficient. In fact, users enter new opportunities five times faster using Dynamics 365. Proactive responses to clients are quicker and smarter, with relevant data in real time informing business decisions. Kutu points out, “We’ve seen a double-digit increase in our higher-ranking employees interacting with our CRM process.

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More transformation is ahead for EY

EY leadership viewed the March 2024 US and Canada rollout as a major milestone in the organization’s journey. But the firm is looking ahead to even more innovative transformation with Microsoft Copilot for Sales. “We’re really excited about Microsoft Copilot for Sales and are already seeing tremendous benefits,” says Kutu. With next-generation AI providing recommendations, conversation sentiment analysis and even seller behavior analysis to recommend new ways of working.” Says Hallett, “We are extremely excited about future possibilities using Dynamics 365. We’re implementing a platform that gives us the opportunity to utilize AI and Copilot, and other advancements to help us serve our clients better, focusing on their value drivers.”

EY | Building a better working world

EY exists to build a better working world, helping to create long-term value for clients, people and society and build trust in the capital markets.

Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate.

Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

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