Case Study:

TRC Staffing - *Dynamics 365 Customer Insights*

Introduction

TRC Staffing Services Inc. (TRC Staffing) is a premier workforce solutions provider specializing in connecting businesses with top talent across various industries. As a company committed to continuous innovation, TRC Staffing sought to modernize its customer engagement strategy and sales performance capabilities. To achieve this, TRC partnered with Microsoft and Cambay Solutions to implement Dynamics 365 Customer Insights, leveraging Co-Pilot for Sales Integration, Sales Performance, and Marketing Automation to enhance its sales pipeline management and customer engagement.

Challenges and Pain Points

Before the implementation of Dynamics 365 Customer Insights, TRC Staffing faced several operational challenges:

- **Limited Sales Visibility –** TRC's existing CRM lacked robust insights into lead qualification, sales pipeline tracking, and customer interactions.
- **Fragmented Marketing Efforts –** Marketing campaigns lacked automation and integration with the sales process, making it difficult to measure impact.
- **Manual Processes –** Sales and marketing teams were burdened with manual workflows, leading to inefficiencies and lost opportunities.
- **Lack of Real-Time Engagement –** TRC Staffing struggled with real-time communication and personalized engagement with prospects and customers.
- **Siloed Data –** Disconnected data sources hindered a unified view of customer interactions and sales performance.

Microsoft, Cambay Solutions, and TRC Staffing **Partnership**

Recognizing these challenges, TRC Staffing collaborated with Microsoft and Cambay Solutions to implement a scalable, AI-driven solution within Dynamics 365 Customer Insights. Microsoft provided the robust cloud infrastructure, Cambay Solutions offered deep technical expertise, and TRC Staffing brought industry-specific requirements to the table. This partnership aimed to streamline sales, marketing, and customer engagement within a unified platform, empowering TRC to leverage real-time analytics and AI-driven automation.

The Proposed **Solution**

Cambay Solutions designed a tailored solution for TRC Staffing, integrating key components of Microsoft Dynamics 365 Customer Insights to enhance sales and marketing operations:

- **Microsoft Co-Pilot Sales Integration –** AI-driven insights for lead scoring, sales call intelligence, and predictive analytics.
- **CRM Sales Insight Assistant –** Custom insights and dashboards to track performance and identify high-value opportunities.
- **Sales Performance & Forecasting –** Automation of key sales processes, ensuring visibility into pipeline trends and revenue forecasting.
- **Marketing Automation –** Seamless email marketing, campaign tracking, and event planning with automated workflows.
- **Power Automate Integration –** Business process automation for sales follow-ups, lead nurturing, and customer segmentation.

These enhancements aimed to provide TRC Staffing with a centralized, data-driven, and AI-powered approach to managing customer interactions, improving marketing ROI, and accelerating sales conversions.

The Journey to Provide the Solution

The project followed a structured implementation approach, ensuring a smooth transition:

- **Project Kickoff & Readiness Assessment –** Cambay Solutions conducted a readiness assessment to understand existing CRM pain points and align goals.

- **Use Case Development –** The team worked with TRC to define specific sales and marketing scenarios for Dynamics 365 deployment.

- **Solution Design & Configuration –** Implementation of Sales Insights, Co-Pilot, and Power Automate workflows to align with TRC's business objectives.

- **Testing & Validation –** User acceptance testing (UAT) was conducted to ensure seamless integration with TRC's existing operations.

- **Deployment & Training –** Cambay provided hands-on training to TRC's sales and marketing teams, ensuring adoption and self-sufficiency.

- **Go-Live & Continuous Optimization –** The solution went live with ongoing monitoring to fine-tune workflows and maximize impact.

The Results

The implementation of Dynamics 365 Customer Insights transformed TRC Staffing's operations, delivering measurable benefits:

50% Increase in Sales Team Efficiency – AI-driven insights reduced time spent on manual sales tracking and lead qualification.	**35% Faster Lead Conversion Rates –** Enhanced visibility into customer interactions led to more targeted engagement and faster deal closures.
Improved Marketing ROI – Automated campaigns and real-time tracking helped optimize marketing spend and improve lead generation effectiveness.	**Seamless Event & Campaign Management –** The new system enabled TRC to execute and track event registrations in real-time, leading to higher engagement.
Unified Data for Smarter Decision-Making – Integrated insights provided a 360-degree view of customers, enabling data-driven decision-making.	

Quotes:

"With Dynamics 365 Customer Insights, we now have a real-time, AI-powered view of our sales pipeline. Cambay Solutions helped us modernize our approach, allowing us to engage customers more effectively and close deals faster."

– Geetha Krishnan, CIO, TRC Staffing Services Inc.

"The integration of Co-Pilot and Power Automate has completely transformed how we manage leads and marketing campaigns. The automation has saved us countless hours, enabling our teams to focus on high-impact activities."

– Brian Robinson, Sales Director, TRC Staffing Services Inc.

> "Cambay Solutions provided an outstanding implementation experience. Their expertise in Microsoft Dynamics 365 and their focus on aligning technology with our business needs made all the difference."
>
> **– Chelsea Green,** *Marketing Manager, TRC Staffing Services Inc.*

Why Cambay Solutions?

TRC Staffing chose Cambay Solutions for its deep expertise in Microsoft Dynamics 365, commitment to delivery excellence, and proven track record in CRM transformation. Key differentiators that set Cambay apart included:

- **Extensive Microsoft Partnership –** Deep knowledge of Dynamics 365 and Microsoft Business Applications.
- **Proven Industry Experience –** Successful implementations across various industries, including staffing and workforce solutions.
- **End-to-End Project Management –** A structured approach ensuring minimal disruption and seamless adoption.
- **Cost-Effective Solutions –** Microsoft Business Application vouchers helped reduce implementation costs while maximizing ROI.

Conclusion

Through its partnership with Microsoft and Cambay Solutions, TRC Staffing successfully modernized its sales, marketing, and customer engagement processes with Dynamics 365 Customer Insights. The project eliminated manual inefficiencies, provided real-time analytics, and enabled smarter decision-making, ultimately positioning TRC for long-term success in a competitive market.

Looking Ahead

TRC Staffing now has a scalable, AI-driven CRM solution that enables data-driven sales, marketing, and customer engagement strategies. With continued enhancements and optimizations, the company is well-positioned to adapt to evolving business needs and drive future growth.