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Business Insights

Microsoft Dynamics 365 Customer Engagement

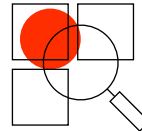
This quarter, we turn our focus to a topic that sits at the intersection of technology strategy and operational resilience: your CRM. As organizations continue to build out their digital infrastructure, the choices made at the customer engagement layer carry consequences that ripple far beyond the front office.

Our two featured articles explore the case for building within the Microsoft ecosystem and the often-overlooked power of a well-implemented Customer Relationship Management system to protect your broader technology investments.

LIDD Rendezvous 2026 is coming soon!

LIDD Rendezvous is where leaders from across the supply chain come together for a day and a half of candid conversations, shared insights, and practical learning. Hosted in Montreal, the event blurs the line between conference and community—where clients, industry peers, and LIDD team members can connect in an open, collaborative setting. Expect thoughtful panels, in-depth case studies, and built-in time for meaningful networking.

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Thought Leadership

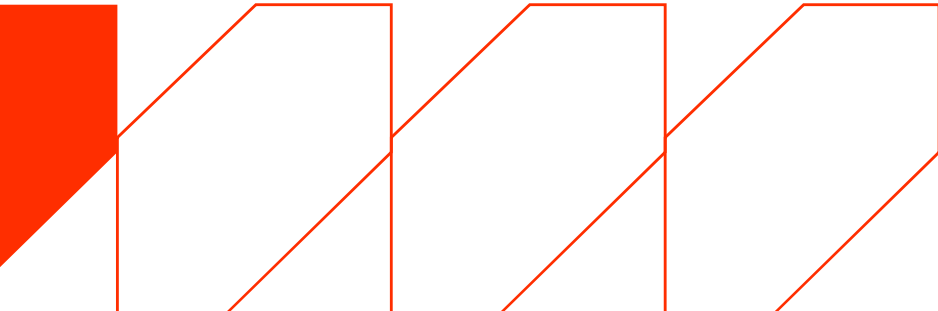
Scale Your Enterprise with the Microsoft Ecosystem

Business Insights

How Your CRM Implementation Can Save Your ERP Implementation

Success Story

Modernizing Sales & Retrieval Operations with Dynamics 365 for Niagara Pallet



Scale Your Enterprise with the Microsoft Ecosystem

The case for committing to a platform, not just buying software

By: Alex Moreau, Manager

In the race to modernize, many organizations find themselves with a collection of point solutions that don't speak to each other. A CRM here. A reporting tool there. A homegrown app bolted on to fill a gap. Over time, this patchwork approach creates exactly the kind of operational fragility that technology is supposed to eliminate. The answer isn't always a bigger system, but rather a smarter platform strategy.

As a delivery leader who understands the impact of fragmented architecture, I have seen firsthand what happens when organizations commit to assembling disconnected tools rather than building within a unified ecosystem. They struggle with sales, service, and operations working in silos. Over time, disconnected systems erode data quality and visibility, making even basic reporting, forecasting, and cross-functional planning more difficult than they should be.

The Microsoft platform, centered on Dynamics 365 Customer Engagement and extended through the Power Platform, offers something that individual applications rarely deliver on their own: the ability to grow your capabilities incrementally, without rebuilding from scratch every time your business evolves.

Beyond Sales and Service: The Ecosystem Advantage

Most people think of a CRM as a place to store contacts and track deals. What they don't see is that Dynamics 365 Customer Engagement is also the front door to a much broader set of capabilities. The Sales and Customer Service modules handle your core commercial workflows: managing leads, opportunities, service cases, and customer interactions with built-in AI assistance and automation. However, the real compounding value comes from what surrounds them.

The Microsoft Power Platform is a suite of tools that enable the creation of personalized applications, portals, and automated workflows by leveraging a low-code/no-code model. This opens the door to infinite possibilities for a business. These tools and the Customer Engagement apps all sit on the same unified database: The Dataverse. A shared data platform that ensures every module speaks the same language.



When your systems share the same data model, you stop building bridges between tools and start building better business processes. That makes it easier to deliver solutions faster, gives users a smoother experience, and keeps reporting consistent once everything is live.

Whether you are on Finance and Supply Chain Management (Enterprise ERP) or Business Central (SMB ERP), your ERP can directly integrate with the Dataverse.

Why it matters: When your CRM and ERP share a common data foundation, a sales rep closing a deal can instantly see inventory availability. A customer service agent can view order history without switching systems. Finance can be proactive rather than reactive. Visibility becomes automatic, not a project.

Low-Code Empowerment: Building From Within

One of the most significant advantages of the Microsoft ecosystem is the Power Platform. Power Apps, Power Automate, Power Pages, and Copilot Studio give your internal teams the ability to build, automate, and analyze without relying on external developers for every enhancement.

This matters more than it might seem. The traditional model of technology improvement where you submit a requirement, wait for a developer, pay for the build, and repeat, is slow and expensive. It creates backlogs, defers value, and keeps your operation reactive. The Power Platform changes this by putting creation in the hands of the people closest to the problem.

One thing I have learned leading Dynamics CE work is that low code delivers the most value when empowerment is supported by strong governance. The goal is not to let every team build in isolation. It is to create enough structure that business users can solve local problems quickly while still contributing to a coherent platform.

Environment Tools



Power Apps

Build custom internal tools without development investment



Power Automate

Automate repetitive tasks, notifications, and multi-step approvals



PowerBI

Expose your shared Dataverse data to external organizations



Copilot Studio

Deploy AI-powered agents for customer-facing or internal support functions

In my experience, the highest-value low-code use cases are usually not the flashy ones. They are the friction points that slow teams down every day, approvals, handoffs, client visibility, and repetitive service tasks. Solving those well often creates momentum for broader platform adoption. We regularly see operations teams build approval workflows in Power Automate, account managers expose dashboards to their clients using Power Pages, and customer service leads deploy automated chatbots through Copilot Studio. All without writing a line of code. These aren't workarounds; they're scalable solutions built on enterprise-grade infrastructure.





Reducing Reliance on External Parties

The goal of any technology investment should be to increase your organization's independence, not deepen its dependencies. When every customization requires a specialized developer, every report requires a consultant, and every workflow requires a ticket, the system is working for the vendor, not for you.

The Microsoft ecosystem is designed to return control to the organization. Standard configuration handles the majority of business requirements. The low-code layer handles the rest. And when deep customization is required, it is done within a well-documented, widely supported framework that any Microsoft-certified partner can pick up and extend.

This portability matters enormously when you're planning for scale. A system that only one person knows how to modify is a bottleneck. A system built on an open, standardized platform is an asset.

Key message

The Microsoft ecosystem isn't just a collection of applications. It's a strategic commitment to building technology that grows with your organization by reducing your reliance on external parties, empowering your internal teams, and creating a foundation that compounds in value over time.

Final Thoughts

Choosing a platform is a different decision than choosing an application. Applications solve today's problem. Platforms define what tomorrow's problems look like and how hard they will be to solve. Organizations that invest in the Microsoft ecosystem aren't just buying software; they are building the infrastructure that makes sustained, scalable growth possible without constantly rebuilding from the ground up.

Choosing a platform is one of the most consequential technology decisions a leadership team can make. The greatest returns rarely come from the broadest feature set. They come from choosing a platform that the organization can realistically adopt, evolve, and govern over time.

The question isn't whether your organization needs a CRM. It's whether your CRM is part of a strategy, or just another tool.

How Your CRM Implementation Can Save Your ERP Implementation



A smart CRM strategy is a risk-mitigation strategy for your entire tech architecture.

When organizations embark on an ERP implementation, there is a common and understandable tendency to treat it as the solution to everything. After years of running on spreadsheets, legacy systems, and disconnected tools, the ERP represents a fresh start: a single system that will finally bring order to the chaos. And so the scope grows. Requirements expand. Customizations accumulate. What started as a focused implementation becomes an enormous, costly, multi-year undertaking.

This pattern is one of the most predictable failure modes in enterprise technology, and one of the most preventable. I have seen well-intentioned projects spend months in design because every stakeholder keeps adding just one more requirement. The root cause is rarely the ERP itself. It is asking the ERP to solve problems it was never meant to solve, while treating scope like a buffet where everything looks reasonable in isolation and disastrous in total.

A well-implemented CRM, deployed before or in parallel with your ERP, can fundamentally change this equation.

The Danger of Over-Developing Inside Your ERP

ERP systems are engineered for precision. They manage inventory, financial transactions, production schedules, and the core operational logic of your business. They are not, by design, optimized for high-volume customer interaction, flexible sales activity management, or the kind of configurable workflows that customer-facing teams need.

When organizations try to force these capabilities into their ERP, the costs are significant and compounding. Every customization adds technical debt. Every workaround requires a developer to maintain it. Every new business requirement has to be weighed against the risk of destabilizing a system that touches your financials, your inventory, and your compliance obligations.

1 Cost creep

Custom development inside an ERP is expensive to build and expensive to maintain. Licensing costs often scale with user counts and module additions, regardless of how those modules are actually being used.

2 Complexity risk

The more customized your ERP becomes, the harder it is to upgrade, integrate, or recover from errors. A system that works perfectly today may become unmaintainable after two years of accumulated changes.

3 Developer dependency

When critical business processes are locked inside custom ERP logic, you become dependent on the people who built it—and vulnerable when they leave.

4 Governance gap

ERPs are often over-permissioned when teams use them for customer interaction, because the access required to serve customers isn't always separable from access to sensitive financial data.

What a Well-Implemented CRM Actually Does for Your ERP

The most effective way to protect an ERP implementation is to define its scope tightly before you begin and to deploy the necessary systems that handle everything outside that scope.

When implemented correctly, Dynamics 365 Customer Engagement shifts customer facing complexity out of the ERP and into the system built for it. CRM can support anything from lightweight engagement to fully tailored workflows that reflect how your business actually operates. The ERP is fed only what it needs to run efficiently, including confirmed orders, verified customer data, and governed service decisions. That separation keeps the ERP stable, reduces customization, and improves both speed and maintainability.

Scope Reduction and Licensing Efficiency

One of the least discussed benefits of a smart CRM strategy is its effect on ERP licensing. Most enterprise ERP platforms price by user, by module, and by transaction volume. When customer-facing teams such as sales representatives, account managers, and service agents are expected to work inside the ERP, you pay to license those users at ERP rates, even though they only need access to a fraction of the system's capabilities.

Moving those users into Dynamics 365 Customer Engagement, where licensing is designed for commercial and service workflows, often produces meaningful cost savings. And because the CRM integrates natively with Business Central, the data flows without manual re-entry or duplicate record management.

Security and Data Governance

Data governance is another area where CRM scope discipline pays dividends. In a poorly scoped ERP implementation, the data model becomes a catch-all: customer records mixed with vendor records, sales activity alongside inventory transactions, service history embedded in financial modules. Over time, this makes auditing difficult, access control complex, and data quality unreliable.

A CRM provides a purpose-built home for customer data with its own access controls, audit trails, and data governance tools. Sensitive financial data stays in the ERP, accessible only to those who need it. Customer interaction data lives in the CRM, accessible to the people serving those customers. The separation is not just tidier; it's more secure.

Key message: Your CRM strategy is not separate from your ERP strategy. It is part of it. A thoughtful CRM implementation reduces ERP scope, lowers licensing costs, improves data governance, and creates the clean demand signal your ERP needs to function at its best. Done right, your CRM doesn't just complement your ERP, it is the reason your ERP implementation succeeds.

In practice

Organizations that implement a CRM before or alongside their ERP consistently report narrower ERP scope, fewer customization requests, faster go-lives, and lower total cost of ownership. The CRM doesn't just complement the ERP, it protects it.

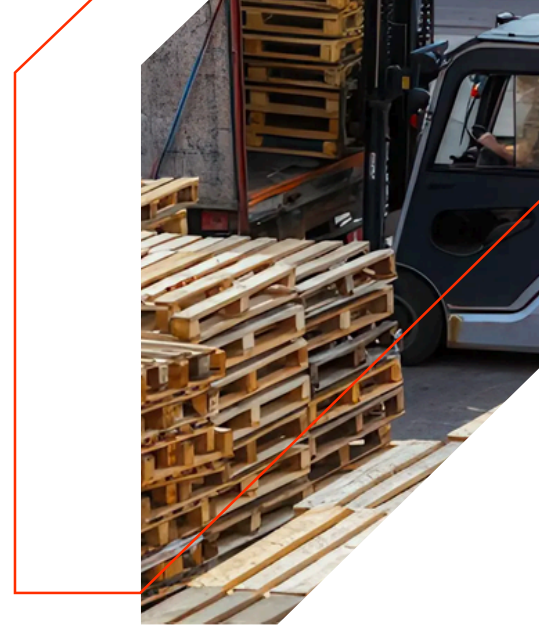
Final Thoughts

The organizations that get the most out of their ERP investments are rarely the ones that customize it the most. They're the ones that were disciplined about what the ERP is supposed to do and invested in the right tools to handle everything else. If you're planning an ERP implementation, or navigating the aftermath of one that expanded beyond its original scope, it's worth asking a simple question: is your CRM working hard enough so your ERP doesn't have to?

CASE STUDY



Modernizing Sales & Retrieval Operations with Dynamics 365



Introduction

Niagara Pallet is a Canadian pallet manufacturing and recycling company operating across sales, retrieval, warehousing, logistics, and scheduling functions to support growth and operational efficiency. Niagara Pallet implemented Microsoft Dynamics 365 Sales to replace fragmented, manual processes and create a centralized system capable of handling its dual-role relationships and future ERP integration needs.

Challenge & Engagement

The primary challenge for Niagara Pallet was transforming their disconnected sales and retrieval processes into a unified, scalable CRM solution, while accommodating dual customer/vendor relationships, reducing manual effort, and preparing for future integration with Business Central ERP.

Deliverables

- 1 Dual sales & retrieval opportunity pipelines**
Purpose-built CRM to manage Niagara Pallet's complex customer/vendor relationships.
- 2 Standardized, automated quote management**
Branded quote templates with embedded pricing, tax, freight logic, and hierarchical approval workflows.
- 3 Custom CRM data model & automations**
Tailored entities, fields, and Power Automate workflows supporting multi ship-to/bill-to logic, accounting notifications, and territory assignment
- 4 ERP-ready CRM architecture**
Future-Proof Dynamics 365 Sales configuration aligned to Business Central integration

Services Provided

- > Dynamics365 Sales implementation and configuration
- > Power Automate workflow design and automation
- > Integration-ready CRM architecture aligned with Business Central

Results



Unified, streamlined operations

Sales and retrieval activities were fully centralized in Dynamics 365, eliminating fragmented tools and manual processes.



Improved data quality & visibility

Standardized records reduced duplication and enabled more accurate reporting and faster, better decision-making across teams.



Strong adoption with minimal disruption

A phased go-live and trained super users drove high adoption while reducing organizational risk during the transition.

LIDD Rendezvous 2026

September 30th
Montréal, Québec

Connect, learn and grow

Rendezvous brings together our staff, clients, and partners from many industries and across LIDD's work in supply chain strategy, design, and technology. This cross-pollination is deliberate – by sharing stories with people working in varying realms, we hope to spur new ideas and connections.

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Generix is a global SaaS provider powering over 2,000 warehouses across North America and Europe. Its flagship platform, Solochain, is a next-generation WMS designed for operational complexity. It seamlessly integrates deep inventory control, real-time visibility, and embedded MES capabilities to manage both warehouse and production floor operations on a single platform.

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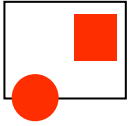
ONOMATIC

Onomatic is the leading orchestrated warehouse management system, connecting inventory visibility, decisioning, and execution into a continuous, real-time flow across people, robots, and systems. ONO, their multi-agent orchestration platform, centralizes workflow logic, priorities, and resource allocation, ensuring every task reaches the right resource at the right moment, from receiving to shipping.

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LIDD is a full service, global operations and supply-chain consulting firm. Our industry leading team of design, strategy, and technology experts optimize operations, enhance productivity, and build intelligent infrastructure for sustainable business growth.



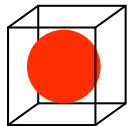
Supply Chain Strategy Consulting

We carefully consider your entire organizational structure. Our data-driven solutions are tailored to your specific business challenges, change management requirements, and future needs.



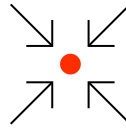
Supply Chain Technology

We select, implement, integrate, and support business management and supply chain execution software.



Distribution Center Design

Whether you're running out of space, operating inefficiently, or struggling with labor costs, we can help you reconfigure or automate your location to drive efficiencies.



Facility Implementation

Build ready-to-use facilities on time and on budget. We handle the entire transition process from RFP to equipment selection and implementation.



About LIDD

LIDD's office serves as a hub of supply chain expertise, delivering innovative solutions to businesses across North America. This quarter's newsletter was created through the concerted efforts of some members of LIDD's Microsoft Dynamics Customer Engagement team.



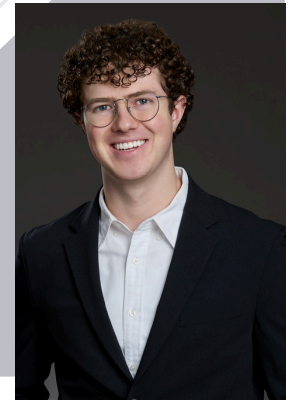
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