Reimagining Business with Dynamics 365 (CRM/ERP) Solutions

Microsoft
Solutions Partner
Business Applications

Who we are

Since 1999, UST has worked side by side with the world's best companies to make a powerful impact through transformation. Powered by technology, inspired by people, and led by our purpose, we partner with our clients from design to operation.

Our digital solutions, proprietary platforms, engineering, R&D, products, and innovation ecosystem turn core challenges into impactful, disruptive solutions. With deep industry knowledge and a future-ready mindset, we infuse expertise, innovation, and agility into our clients' organizations—delivering measurable value and positive lasting change for them, their customers, and communities around the world. Together, with 30,000+ employees in 30+ countries, we build for boundless impact—touching billions of lives in the process.

Our core values

Humility
Humanity
Integrity

OUR HISTORY

- Born digital in 1999
- HQ. Aliso Viejo, CA, USA
- 30,000+ employees
- 140+ Fortune 500 and Global 2000 clients

GLOBAL & LOCAL PRESENCE

- 30 countries
- USA, Canada, India, Malaysia, Singapore, Philippines, China, Taiwan, Australia, Israel, United Kingdom, Bulgaria, France, Germany, Portugal, Poland, Spain, Mexico

UST Microsoft Dynamics 365 practice snapshot

UST leverages Microsoft Dynamics 365, Copilot, and extensive industry expertise to drive intelligent, sustainable digital transformation.

As a Microsoft Solutions Partner, UST delivers innovative Microsoft Dynamics 365 implementations integrated with AI and low-code/no-code capabilities.

Our comprehensive portfolio spanning consulting, platform, maintenance, and surround services ensures expert guidance at every stage, using AI-assisted workflows and natural-language insights to maximize CRM/ERP investments, streamline operations, elevate customer experiences, and accelerate sustainable business growth.

OUR OFFERINGS

Our Microsoft Dynamics 365 practice provides end-to-end services that covers the entire lifecycle of CRM and ERP transformation – from upfront advisory through implementation to ongoing optimization.

Consulting Services

- Cloud Transition Assessments
- Legacy Application Migration
- Business Value Workshops
- Project Health Analysis
- Workload Expansion Assessments

Managed Services

- Application Maintenance and Support Desk
- Co-Innovation and Co-Development
- User Adoption Success Planning
- Dedicated Staffing Support
- Microsoft Power Platform Center of Excellence

Platform Services

- Discovery and Planning
- Solution Architecture and Design
- Implementation and Configuration
- Solution Extensions and Integrations
- Global Deployment and Rollouts
- Upgrades and Transition Management

Surround Services

- Quality Assurance (QA) and Testing
- Integration Services
- Data Migration and Management
- Performance Optimization
- DevOps for Dynamics 365
- Adoption and Change Management (ACM)

OUR TECHNICAL SOLUTIONS

Customer Engagement (CRM)

- Empowered Sales
- Modernize Customer Service
- Connected Field Service
- Customer Insights Marketing
- SFDC to Dynamics 365 Migration

Finance and Operations (ERP)

- Connected Financials
- Modern Store Experience
- Connected Supply Chain Management
- Empowered Project Operations
- Dynamics AX to Dynamics 365 F&O Upgrade

Power Platform (LCAP)

- Use Case Innovation with Power Platform
- Center of Excellence (CoE) for Power Platform
- Hyper automation with Power Automate
- Chatbot with Power Virtual Agents
- Robotic Process Automation (RPA) to Power Automate Migration
- SharePoint to Power Pages Migration

General/Assessments

- Business Case Assessment
- Solution Health Assessment
- Upgrade Transition Assessment
- Robotic Process Automation (RPA) Migration Assessment
- Application Managed Services (Basic, Advanced and Premier)
- Adoption and Change Management for Business Applications

OUR INDUSTRY VERTICALS

UST recognizes that each industry has unique challenges and requirements. Our Microsoft Dynamics 365 practice brings deep domain expertise to tailor solutions for specific sectors, ensuring that out-of-the-box capabilities are augmented with industry best practices and customizations where needed.

Healthcare

1 in 7 U.S.health insurance claims processed by UST technology

Retail

5 of top 10 U.S. retailers are strategic partners

Banking and Financial Services

Support 2 of top 5 U.S. asset management firms. Strategic partner to a top 100 global banking company

Telecom

Driving growth for 3 of the top 8 global telecoms. Preferred D365 partner for top US telecom company

Manufacturing

Strategic ERP Implementation Partner for the UK's leading coffee manufacturer

Automotive

Strategic global partner of 25th largest car manufacturing company

Insurance & Investments

Implementation and AMS partner of a top 10 insurance company in India

Hi-Tech

Strategic global partner of a top 20 software company globally

Accelerate Growth and Innovation with UST's proven dynamics 365 expertise

1 Microsoft Certified Business Applications Partner.

2 400+ Microsoft Dynamics 365 Experts.

3 100+ Application Integration Experience

4 20+ years of Microsoft Expertise with 12+ Years in Dynamics 365

UST INTELLECTUAL PROPERTIES AND INNOVATIONS

UST's Dynamic Marketplace provides ready-to-deploy accelerators that rapidly enhance Dynamics 365 capabilities, enabling quicker value realization. Accessible via Microsoft AppSource, these AI-powered solutions solve common business challenges, offering secure, scalable integration with expert UST support.

UST Automotive Accelerator for Dynamics 365

Streamline automotive sales, enhance lead management, and deliver exceptional customer experiences.

UST Banking Accelerator for Dynamics 365

Enhance banking CRM capabilities, streamline regulatory compliance, boost operational efficiency, and deliver personalized customer experiences.

UST Insurance Accelerator for Dynamics 365

Simplify claims processing, optimize policy management, ensure compliance, and elevate customer experiences.

UST User Default for Dynamics 365

Eliminate repetitive data entry, increase accuracy, and boost user productivity with personalized, role-based default settings.

UST Incident Management for Dynamics 365

Automate and tailor incident workflows within Dynamics 365 to shorten resolution times, enforce SLAs, and enhance customer satisfaction.

UST System Job Insights for Dynamics 365

Real-time monitoring and management of system jobs reduces CRM disruptions, enhances performance, and minimizes storage waste through an intuitive dashboard.

UST Attachment Mover for Dynamics 365

Seamlessly move attachments from Dataverse to external storage, enhancing Dynamics 365 performance and significantly reducing storage costs.

UST Workflow Scheduler for Dynamics 365

Precisely schedule and automate Dynamics 365 workflows to boost efficiency, minimize manual tasks, and ensure consistent, reliable operations.

UST Auto Assignment for Dynamics 365

Automate task distribution with customizable rules including direct assignment, round-robin, and load balancing to ensure fair and efficient workload management.

UST Auto Number for Dynamics 365

Generate unique, formatted identifiers with customizable auto-numbering, enhancing data integrity, operational efficiency, and scalability within Dynamics 365.

UST Data Archival for Dynamics 365

Automatically move infrequently accessed data to Azure, lowering storage costs and enhancing Dynamics 365 system performance.

Microsoft Dynamics 365 Finance and Operations Fixed Hour Support Package

Fixed-hour support for Dynamics 365 Finance and Operations accelerates issue resolution, optimizes performance, strengthens security, and enhances integrations and reliability.

We are an ESI-enabled Microsoft Solutions Partner, delivering future-ready business transformation through deep expertise and continuous innovation.

1 Comprehensive platform coverage across Customer Engagement, Business Central, and Finance and Operations.

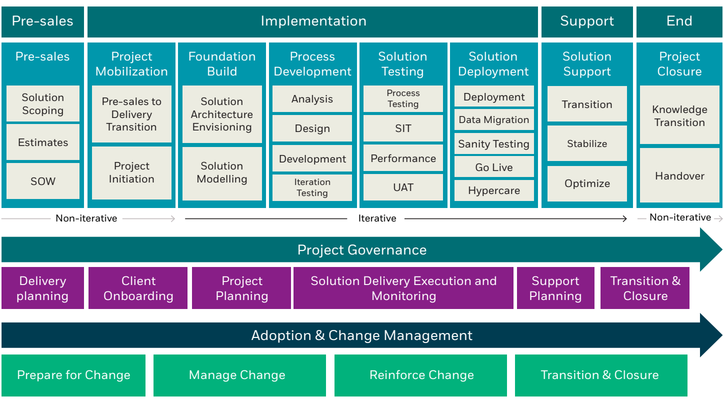
2 Proven reliability with client relationships averaging over 7 years.

3 Accelerated value through industry-ready, pre-built solutions that reduce risk and speed up delivery.

4 Round-the-clock global support powered by our Sun Mode delivery model.

DELIVERY METHODOLOGY

UST and Microsoft's strategic global alliance focuses on solving critical business challenges nurturing future growth, increasing agility, strengthening resilience with enterprise focused, scalable, and mission-critical solutions.



Pre-sales	Implementation					Support	End
Pre-sales	Project Mobilization	Foundation Build	Process Development	Solution Testing	Solution Deployment	Solution Support	Project Closure
Solution Scoping Estimates SOW	Pre-sales to Delivery Transition Project Initiation	Solution Architecture Envisioning Solution Modelling	Analysis Design Development Iteration Testing	Process Testing SIT Performance UAT	Deployment Data Migration Sanity Testing Go Live Hypercare	Transition Stabilize Optimize	Knowledge Transition Handover

Non-iterative → Iterative → Non-iterative →

Project Governance

Delivery planning | Client Onboarding | Project Planning | Solution Delivery Execution and Monitoring | Support Planning | Transition & Closure

Adoption & Change Management

Prepare for Change | Manage Change | Reinforce Change | Transition & Closure

Customer success stories

Improved scalability and agility

Automotive

THE CASE

A major luxury car manufacturer faced significant challenges with its global CRM infrastructure. The existing fragmented system limited agility, slowed feature rollouts, and hindered customer service responsiveness across dealerships worldwide.

SOLUTION

UST migrated the on-premises solutions to the cloud and redesigned and standardized the company's CRM system using Azure Serverless technologies. The team used Azure Data Factory to migrate data from legacy systems to the new global solution. To avoid disruption to the business, the UST team delivered a minimum viable product in 12 weeks in 8 countries and continues to support additional features to promote business growth.

Delivering excellence across borders

Manufacturing and retail

THE CASE

A leading coffee manufacturer faced fragmented finance, supply chain, sales, and field service systems in Spain, the UK, and Ireland. Disparate processes and master data slowed order management and constrained visibility.

SOLUTION

UST re-engineered reusable back-office processes across Spain, the UK, and Ireland on Dynamics 365 CRM/ERP. Cloud-first, leveraging SaaS, Copilot AI, and API-led integration with embedded analytics - simplifying deployment, maintenance, and support. Built for quick go-to-market, it strengthened sales and order management and scaled to the Netherlands, Switzerland, France, Germany, and Portugal.

Unified ERP systems across 30+ countries

E-commerce

THE CASE

A global eyewear manufacturer and omnichannel retailer operated fragmented Microsoft NAV ERP systems across multiple regions, causing limited financial visibility, inconsistent processes, and inefficiencies in supply chain and inventory management across its operations in over 30 countries.

SOLUTION

In just 12 months, UST successfully upgraded the retailer to a unified Dynamics 365 Finance and Operations system, consolidating all regional ERP instances into a single global platform. The project included seamless integration with more than 30 third-party applications, including e-commerce platforms, warehouse management, and point-of-sale systems. The unified ERP core significantly improved financial visibility, streamlined global supply chain processes, optimized inventory management, and provided a robust, scalable foundation for future growth.

29% reduction in claims processing time

Insurance

THE CASE

A large insurance company embarked on a transformation to become a fully digital enterprise but was hindered by fragmented CRM systems across branch offices, call centers, online portals, and various disconnected data sources. This fragmentation resulted in operational inefficiencies, inconsistent customer insights, and slow claims processing.

SOLUTION

UST partnered with the insurer to deploy a centralized Dynamics 365 CRM system, integrating previously siloed branch office systems, call centers, online portals, and disparate data sources. This unified platform automated and optimized critical processes, notably claims handling, resulting in a 29% reduction in processing time and significantly enhancing customer satisfaction and operational effectiveness.

Enterprise CRM for claims and settlements automation

Finance

THE CASE

A 20-year-old life insurer formed as a joint venture between a leading publicly owned Indian bank and an international financial institution struggled with manual payout settlements. Claims, surrenders, and withdrawals required multiple hand-offs; staff triaged 5,000+ emails daily, created cases manually, and toggled across systems, driving errors, delays, and SLA risk. The company sought a CRM to automate workflows, accelerate settlements, and improve decision-making with a 360° customer view.

SOLUTION

UST deployed Microsoft Dynamics 365 CRM and integrated it with core systems (Ingenium, claims, documents, compliance) to streamline sales and customer service. The solution enables email routing to auto-sort 5,000+ daily emails, centralized document management, and automated workflows for case creation, tracking, communications, and settlements. Real-time dashboards surface key metrics with SLA alerts, while a unified 360° profile supports personalized, connected experiences.

360° customer view, faster sales

Telecom

THE CASE

An American multinational telecom sought to modernize sales and customer management with Dynamics 365 Sales and Customer Insights. Its monolithic stack couldn't support a pivot to Managed WAN and Security Services, lacked AI, and offered weak process support, slowing decisions and preventing a true 360° customer view.

SOLUTION

UST launched Phase 1 with a secure, unified Dynamics 365 platform. It added trigger-based journeys, behavior-driven personalization, streamlined lead-to-opportunity management, and persona-based column-level security. Bidirectional sync and integrations with third party applications to provide real-time data, prioritized pipelines, and timely renewal engagement to accelerate cycles and boost productivity.

We journey with our clients to create successful outcomes

13 Years

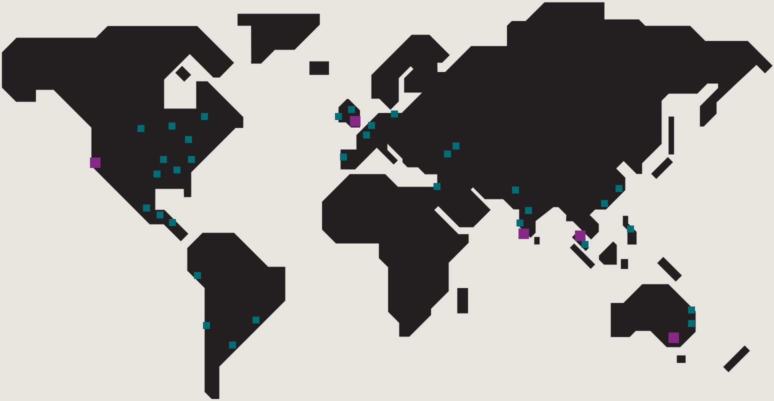
Average tenure of client relationships

We believe in building long term partnerships with clients

- More attention paid to client success at all levels
- Commitment beyond contract – to deliver business outcomes
- Flexible contractual models
- Consistent executive attention
- Client feedback drives investments up front and throughout the journey

Where you'll find us

With our teams working around the world, we're creating change that reaches far and wide.



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🟪 Main Offices & Innovation Labs
🟦 Operation Centers

*To see a list of all offices, visit **ust.com**

86% of our global footprint is ISO 14001:2015 (Environmental Management System)

43% of our global footprint is LEED Gold Certified

Together with our clients, we believe we can have boundless impact in the world around us.

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