

Improving User Adoption, Compliance, and Client Insights with Microsoft Dynamics 365



Customer Profile

JDIMI Consulting Navacord is a Canadian financial services brokerage providing solutions to businesses and individuals across Canada.

Its services include corporate group benefits, group retirement and pension plans, financial planning, individual life insurance, and living benefits.

Goals

- Replace Improve CRM adoption across the organization.
- Standardize client service and advisory processes.
- Strengthen information security and audit readiness.
- Create a complete view of client relationships and interactions.
- Improve reporting and leadership visibility.
- Maintain a high level of client service.

Industry

Financial Services Brokerage

CAN HQ: Ontario

Partner

Endeavor4

www.endeavor4solutions.com

Executive Summary

JDIMI Consulting Navacord is a Canadian financial services brokerage specializing in group benefits, group retirement, financial planning, and individual insurance solutions.

After experiencing limited value and inconsistent user adoption with Salesforce, JDIMI needed a CRM platform that could better support its business processes, information security requirements, and client service teams. Endeavor4 implemented Microsoft Dynamics 365, Microsoft 365, and SharePoint Online to centralize client information, track communications, automate document management, and provide leadership with improved reporting and analytics.

Business Challenge

JDIMI's existing Salesforce system suffered from inconsistent user adoption, limited adherence to business processes, and an inability to effectively track email communications. Leadership also lacked meaningful insights and a complete view of interactions between clients and JDIMI's financial advisors.

As part of Navacord, JDIMI also faced growing requirements around information security and historical record auditing. The organization needed a more structured CRM environment that could improve visibility, standardize processes, and support the secure management of sensitive client information.

Solution

Endeavor4 began with a CRM Health Check to identify key challenges, document existing processes, and prioritize opportunities for improvement. Collaborative planning sessions helped establish standardized business processes that could be adopted consistently across the organization.

Endeavor4 then implemented and configured Microsoft Dynamics 365 Sales and Customer Service, with integrations to Microsoft 365 and SharePoint Online. The solution included customized entities, forms, screens, and fields, along with activity and email tracking, automated document storage, task management, KPI dashboards, and performance analytics.

“This new system is so great that I’ve mandated that each member of the team open Dynamics 365 first thing in the morning and use it diligently throughout their day.”

Scott Studley, Partner, Group Retirement & Pension

Business Benefits

Microsoft Dynamics 365 reduced the preparation time required by the Client Services team before client meetings. Automated document management and comprehensive email tracking also helped JDIMI strengthen information security and team productivity without adding unnecessary administrative work.

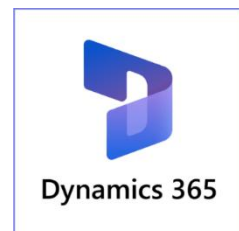
The new account and contact hierarchy gave teams a 360-degree view of corporate clients, retirement and benefits plans, and individual client relationships. This made it easier to understand and manage complex relationships across the organization.

By standardizing client-focused processes and consolidating information, Dynamics 365 helped JDIMI improve visibility, organization, and service delivery while protecting sensitive client information.

Transformative Partnership

Endeavor4 worked with JDIMI to move beyond a technology replacement and establish more consistent business processes across the organization. The initial CRM Health Check provided a structured foundation for identifying pain points, prioritizing requirements, and developing an action plan.

Following implementation, Endeavor4 continued to support JDIMI through system optimization, reporting, and enhancements. This ongoing partnership helps JDIMI adapt its platform as client service, compliance, and operational requirements evolve.



About Endeavor4

At Endeavor4, we strive to make every system smarter, every process simpler, and every decision yield success – because we strive to deliver everyday excellence for our clients. We are a North American Consulting and Microsoft Cloud Solutions Partner for business applications – we have the depth and breadth of capability to help each client unlock the full power of their AI, ERP, CRM, and Specialty Cloud Solutions.

True partnership and living our 4 core values of Knowledge, Integrity, Trust, and Accountability are the promises we make and keep. This means we never lose sight of what each of our clients’ unique needs are. We don’t push our own agenda – we listen, we advise, we focus on making your business applications work smarter and harder.

When choosing Endeavor4, you have a team that cares about realizing your goals as deeply as you do. We endeavor for excellence, and we are determined to deliver it, every day and in every way. We welcome the opportunity to endeavor for you. Boston, Chicago, San Antonio, Halifax, Montreal, Toronto, Edmonton, and Vancouver.

