



Increasing CRM Adoption, Sales Performance, and Customer Visibility with Microsoft Dynamics 365



Customer Profile

JPL is a Canadian vehicle and equipment leasing company with offices in Calgary, Edmonton, Toronto, and Ottawa.

The company specializes in commercial fleet leasing and asset management services, supporting organizations across Canada through long-term customer relationships and industry expertise.

Goals

- Increase CRM adoption across the organization.
- Improve sales pipeline visibility and forecasting.
- Strengthen customer service and customer relationships.
- Support profitable growth and high renewal rates.
- Establish consistent sales processes and performance metrics.

Industry

Commercial Vehicle & Equipment Leasing

CAN HQ – Sites:

- Calgary
- Edmonton
- Toronto
- Ottawa

Partner

Endeavor4

www.endeavor4solutions.com

Executive Summary

Jim Peplinski Leasing (JPL) is a Canadian vehicle and equipment leasing company serving commercial fleets across Canada. As the organization continued to grow, its legacy Microsoft Dynamics CRM environment was no longer aligned with evolving business needs and sales processes.

To better support its sales organization and enhance customer engagement, JPL upgraded to Microsoft Dynamics 365. Endeavor4 delivered the platform upgrade, integrated Dynamics 365 with JPL's internal fleet management system, and helped establish new sales processes, dashboards, training programs, and adoption strategies that increased the value of the CRM across the organization.

Business Challenge

JPL's existing CRM platform lacked the capabilities needed to support the company's evolving sales and customer relationship management requirements. Leadership wanted to better align technology investments with business processes while providing sales teams with tools that could improve efficiency, forecasting, and customer service.

While evaluating CRM options, JPL recognized that upgrading its existing Microsoft CRM environment offered the best path forward. However, the organization needed a partner capable of managing the technical upgrade, configuring the solution to fit its business processes, and driving user adoption through change management and training.

Solution

Endeavor4 upgraded JPL to Microsoft Dynamics 365 and implemented a custom integration with the company's internal fleet management system. The project also included the development of new opportunity management and sales pipeline processes tailored to JPL's business requirements.

Role-based dashboards gave executives, managers, and sales representatives access to real-time sales metrics and pipeline visibility. To support long-term success, Endeavor4 developed a comprehensive change management and user adoption strategy that included training, coaching, and ongoing CRM best practices.



“Our focus on user adoption has played a key role in our Dynamics 365 CRM upgrade. Training sessions, tips of the week, a user blog, sales contests and top-down management support have all been critical success factors. We are confident that effective use of our Dynamics 365 CRM system will translate into increased customer satisfaction and stronger sales.”

Jamie Barbour, Director, Operations & HR

Business Benefits

By aligning Dynamics 365 with JPL's sales processes, opportunity management practices, and forecasting requirements, the CRM became significantly more relevant and valuable to day-to-day users. This led to stronger engagement and higher user adoption throughout the organization.

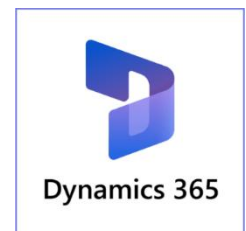
Mobile access and workflow automation helped sales teams save time while improving visibility into customer interactions and sales activity. Leadership also gained access to consistent metrics, dashboards, and reporting tools that supported more informed decision-making.

Most importantly, JPL established a culture of CRM adoption supported by structured training, management accountability, and ongoing performance reviews. This approach created greater consistency across teams while reinforcing a customer-focused sales culture.

Transformative Partnership

Endeavor4 partnered closely with JPL throughout both the technical implementation and organizational change initiatives. Beyond delivering the CRM upgrade, the team helped define sales processes, establish performance metrics, and develop a long-term adoption strategy.

By combining technology modernization with change management and user enablement, Endeavor4 helped JPL maximize the value of its Dynamics 365 investment and create a stronger foundation for future growth.



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.

