



Cegedim E-Business Drive Customer Insight and Efficiency with Dynamics 365 and **Synergy Technology**



Microsoft Dynamics 365
Sales



cegedim
e-business



synergy
technology

Introduction

Cegedim E-Business UK is a 45-person team delivering a mission-critical SaaS platform that powers daily trading for businesses across the UK. Operating at the heart of the digital supply chain, they ensure orders, deliveries, invoices, and payments happen smoothly, accurately, and on time.

Their customers range from small businesses taking on their first major contract to some of the largest retailers, manufacturers, and healthcare providers. Every customer relies on uninterrupted trading, with Cegedim as the backbone that keeps their operations running.

Katrina Merry works across sales support and customer success, leading the CRM platform and initiatives to improve customer engagement, reporting, and insight. She works closely with sales, projects, and finance teams to ensure Dynamics 365 underpins consistent, high-quality service while identifying opportunities to refine internal processes.

The Challenge: An Ageing Version of Dynamics

Cegedim was using an ageing, heavily customised on-premise version of Dynamics CRM 2013. The system was slow, prone to errors, and difficult to maintain. Their version was approaching end of life and becoming increasingly unreliable.

Katrina recalls “There were a lot of errors in version 2013. The sales team often complained of crashes, we don’t have any kind of connectivity issues now.”

Reporting was challenging, integrations were limited, and data consistency was hard to maintain. With the business growing, they needed a modern, reliable CRM to provide better insights, track customer journeys, and support scalable processes.

The Solution:

Microsoft Dynamics 365 Sales Online

Cegedim E-Business chose to upgrade to Microsoft Dynamics 365 Online, selecting Synergy Technology as its specialist CRM partner to manage the migration and deliver a modern, cloud-based platform. We guided them through the re-platforming, stabilised integrations, and improved performance, while keeping the project on track as requirements evolved.

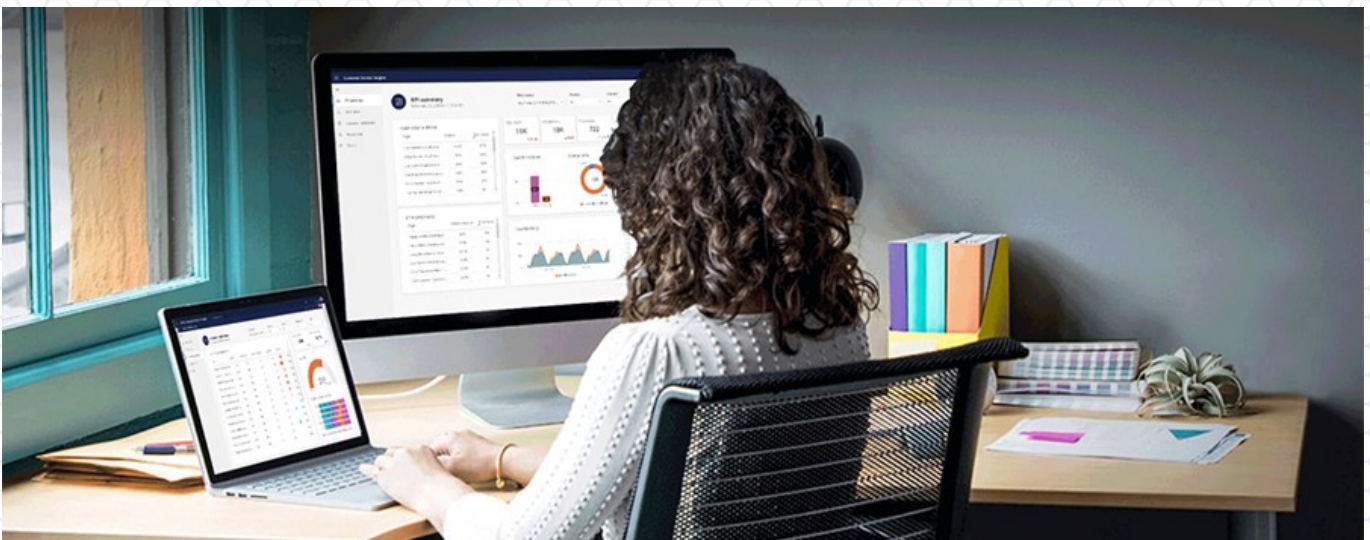
Katrina says:

“I have to say that Synergy and everybody involved, especially John [CRM Support], was incredible. He has so much knowledge, is incredibly helpful, and approachable. It made the whole process much smoother.”

Post-go-live, Cegedim benefits from combined support from internal IT and Synergy, ensuring issues and requests are handled quickly. Regular account management also keeps the CRM aligned with business needs.

Katrina says:

“Matt our account manager keeps us updated on new features and helps us understand how they can benefit the way we work.”



The Results: Better Insight and Usability

The move to Dynamics 365 has transformed visibility of customer data. Teams can now segment customers, track journeys, and produce more meaningful reports. Katrina notes: "It certainly gives us much more insight into our customer base. Not only is it more user-friendly, but being able to identify and segment customers through reports has really helped us understand customer retention and value."

Streamlined Processes

Dynamics 365 is now used across sales and projects, creating a single source of truth for customer and order information. This reduces duplication, improves handovers, and ensures everyone works from the same reliable data. Integrated proposal tools make quoting faster and more accurate, and the cloud platform has removed the frequent errors and crashes of the old CRM.

The Future

With a modern CRM foundation in place, Cegedim is looking to deepen integration between teams, giving everyone a live view of customer and project status. Our partnership with Cegedim continues to grow. Through ongoing support, guidance, and proactive account management, we're helping them get the most from Dynamics 365 and look forward to supporting future projects and integrations together.

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