

Dynamics Square implements Microsoft Dynamics 365 CRM for New York design studio

NY, UNITED STATES, April 30, 2026 /EINPresswire.com/ -- A New York-based interior design studio has upgraded its client and sales operations following the implementation of Microsoft Dynamics 365 Sales by [Dynamics Square](#).

The decision comes as the firm expands its residential and commercial portfolio and looks to bring more control to how client relationships are managed.

Until recently, most of that work sat inside email. Teams relied on Microsoft Outlook to track leads, conversations, and follow-ups. It worked when volumes were lower. It became harder to manage as inquiries increased.

Important details were spread across inboxes. There was no consistent way to track deal progress. Follow-ups depended too much on individual effort.

Over time, that created gaps. Visibility into opportunities dropped. Coordination became slower. Teams did not always have the same information at hand.

To address this, Dynamics Square implemented [Microsoft Dynamics 365 Sales CRM](#) with a focus on structure and usability. More details on the solution can be found here: <https://www.dynamicsquare.com/microsoft-dynamics-365-sales/>

The system now brings client data, communication history, and opportunity tracking into a single environment. Leads move through defined stages. Client inquiries are handled through a structured case process rather than scattered email threads.

The rollout also included a full data migration. Around 6,000 accounts, 8,500 contacts, and close to 30,000 notes were transferred into the new system, along with relevant data from project tools.

The change has improved day-to-day operations. Teams can see what is active, what needs attention, and what is moving forward. Response times have improved, and less time is spent searching for information.

A spokesperson from Dynamics Square said the focus was on keeping the system practical. "The goal was to introduce structure without making the process heavier for the team."

A representative from the client organization said the system fits how they work. "We needed something that could support growth but still feel simple to use. This has helped bring clarity to our process."

About Dynamics Square

Dynamics Square delivers [Microsoft Dynamics 365 ERP](#) and CRM solutions to organizations looking to improve operations, strengthen customer engagement, and scale efficiently.

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