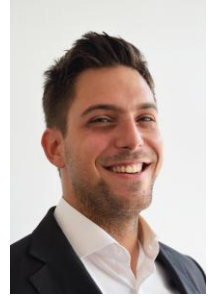


Alex Dan

Senior Dynamics 365 Solution Architect
& Microsoft Certified Trainer (MCT)

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Professional profile

Senior solution architect with 10+ years of experience in Dynamics 365 Customer Engagement and Power Platform across Microsoft, implementation partners and customer organisations. Combines hands-on CRM delivery with discovery, solution envisioning and technical presales for enterprise customers in the DACH region, including transportation, manufacturing and financial services.

Translates business priorities into target processes, solution concepts and implementation scope. Brings experience in ERP-connected CRM landscapes, SAP process and integration requirements, D365 Finance integration assessment, customer data and applied AI. Former Microsoft Technology Specialist and Microsoft Certified Trainer since 2018.

CRM discovery for logistics

- **Workshops and alignment** Facilitate discovery and fit-gap workshops with business and IT stakeholders; clarify pain points, target processes, priorities and standard Dynamics 365 capabilities.
- **Business process design** Map key-account management, commercial enquiries, opportunities and quotations; connect customer service, SLAs and operational handovers with ERP processes.
- **ERP and data** Clarify CRM and ERP responsibilities, customer master data, identifiers, synchronisation and visibility of quotes, orders and financial information. Assess integration needs in AX and D365 Finance landscapes.
- **Implementation planning** Shape a high-level solution concept, prioritised backlog, phased roadmap, licensing assumptions and delivery estimates; validate the approach through focused demos and prototypes.

Current engagements

Solution Architect Microsoft Business Applications

 ORBIS Schweiz AG | Nov 2023 - Present

- Lead solution design and support delivery of Dynamics 365 Sales, Customer Service, Field Service and Power Platform solutions, including ERP integration scenarios for Swiss enterprises.

Freelancing/Independent Solution Architect and Senior Consultant

Freelance engagements | Aldan Business Solutions SRL since Sep 2024 | Nov 2021 - Present

- Provide CRM architecture, discovery and implementation support, including Project Operations and resource scheduling for the largest German public transportation company.

Technology expertise

Dynamics 365 Sales, Customer Service, Field Service, Project Operations and Customer Insights Journeys (Marketing); Dataverse, Power Apps, Power Automate and Power BI; Copilot Studio and Azure AI. CRM integration design, SAP process mapping, D365 Finance integration scenarios, APIs and Azure Integration Services; security, data quality and ALM with Azure DevOps.

Selected Dynamics 365 project experience

Representative delivery and discovery engagements spanning CRM, customer operations, ERP integration requirements and AI adoption.

Dynamics 365 Sales, Copilot and SAP integration in precious metals

Lead solution design and implementation of Dynamics 365 Sales for the largest Swiss precious metals group, aligning customer management, sales processes and account qualification with SAP integration. Facilitate discovery workshops covering customer hierarchies, segmentation, sales-area data, master-data ownership and synchronisation requirements. Design process automation and security models and assess Copilot and Sales Agent use cases for identifying customer potential, customers at risk and opportunities requiring follow-up, including data access, licensing and deployment dependencies.

Sales and SAP integration in heating and climate technology

Designed lead qualification and ownership rules in Dynamics 365 Sales and Customer Insights Journeys (Marketing) for one of the world's largest heating and climate technology manufacturer in a SAP-connected landscape. Aligned opportunity stages with SAP quotations and worked on customer-at-risk follow-up sequences. Addressed data imports, duplicate handling and automation to support consistent sales execution.

International sales harmonisation and customer data unification in household appliance manufacturing

Support the harmonisation of Dynamics 365 Sales processes across Swiss and international operations for a household appliance manufacturer. Analyse existing processes and facilitate discovery workshops covering account and contact management, lead and opportunity management, key-account planning, customer visits and framework agreements. Define common customer data structures and SAP integration requirements to support a unified customer view and consistent sales reporting across markets. Translate business requirements into Dynamics 365 and Power Platform capabilities, a prioritised backlog and a phased implementation roadmap.

Transportation and project operations

Contributed to a Dynamics 365 Project Operations implementation and migration from Project Service Automation for the largest German public transportation company, including resource scheduling. Brings relevant experience with complex operational requirements in the transport sector.

CRM discovery and SAP processes in electrical contact manufacturing

Structured CRM workshops for an electrical contact materials manufacturer covering account and contact models, segmentation, customer hierarchies, SAP Business Partners and sales-area data. Clarified prospect creation, master-data ownership, synchronisation and change-request requirements. Addressed business units, team-based access and management visibility as part of CRM solution design.

D365 Finance integration assessment

Assessed Dynamics 365 CE and Finance integration scenarios, including account and contact synchronisation across tenants, interface boundaries and alternative Azure-based integration approaches. Explored Sales, Project Operations and Finance dependencies and document-generation requirements. Experience supports early architecture decisions and coordination with Finance specialists.

Customer service and contact centre in sliding door systems

Supported Dynamics 365 Customer Service and Contact Center configuration for a sliding door systems manufacturer, covering voice, chat, queues, routing, SLAs and agent experience. Investigated caller identification and phone-data quality; designed a normalisation approach. Configured and transported a Copilot Studio voice agent between environments to support the customer greeting experience.

Professional experience

Technology Specialist Dynamics 365 and Power Platform



Microsoft Switzerland | Oct 2022 - Jun 2023

- Led solution envisioning, business-value demonstrations and PoC/MVP design for enterprise customers; addressed RFPs, technical requirements and licensing alignment.
- Drove the Digital Contact Center Platform presales motion in Switzerland and collaborated with sales teams, technology strategists and implementation partners.

Manager Technical Solution Seller Microsoft Business Applications



Avanade Switzerland | Jan 2022 - Oct 2022

- Coordinated Dynamics 365 and Power Platform proposals, client workshops and demonstrations; worked with architects on solution blueprints, delivery plans and staffing estimates.

Technical Product Owner Dynamics 365



SoftwareOne | Sep 2020 - Dec 2021

- Owned the PSA roadmap and requirements for migration to Project Operations. Coordinated development, QA and stakeholder priorities for a platform serving 2,000+ users.
- Worked with product owners on integration scenarios involving NAV/Business Central and Dynamics 365 Human Resources.

Partner Technical Consultant



Microsoft | Aug 2016 - Sep 2020

- Advised partners on Dynamics 365 CRM and Power Platform architecture, implementation approaches, RFPs and PoCs. Delivered technical workshops, training and hands-on labs.



Earlier career: Partner Business Consultant, Oracle (Jun 2015 - Jul 2016); B2B and E-Commerce Manager, Radar Group (Oct 2011 - Jun 2015).

Selected qualifications



Microsoft Certified Trainer since 2018; Microsoft certifications achieved in Dynamics 365 and Power Platform solution architecture, Field Service, Customer Service, Power Platform development and Azure AI engineering. Professional Scrum Master I and Professional Scrum Product Owner I.

Education



MSc International Business Administration, University of Vienna | 2011 - 2013



Data Science and Machine Learning programme, MIT Professional Education | 2023 - 2024



Bachelor in Management, Bucharest University of Economic Studies | 2008 - 2011

Languages

Romanian: native | English: fluent, IELTS 8 and Business English C1

German: professional working proficiency, DSD II C2 qualification