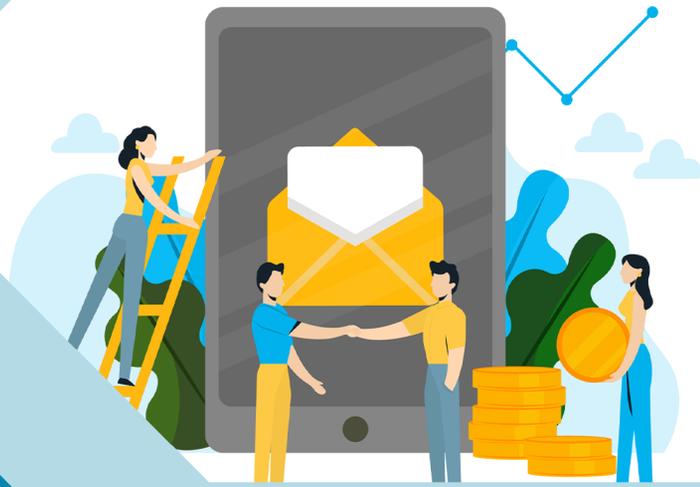


# CASE STUDY

## Turning Complex Workflows into Simple, Efficient Communication



### ABOUT

OMICRON is an international provider of innovative testing, diagnostic, and monitoring solutions for the electrical power industry. Customers in more than 170 countries rely on its technology and services, including consulting, commissioning, cybersecurity, testing, diagnosis, and training. With a strong global presence and partner network, OMICRON is a market leader in its field.



[www.omicronenergy.com](http://www.omicronenergy.com)



1,400 employees



Energy, Power Engineering

### CHALLENGES

Even before adopting Microsoft Dynamics, OMICRON already recognized a growing challenge: managing a vast stream of customer communications across multiple teams and regions. Emails, often built on standardized templates, were critical, but cumbersome to coordinate and maintain at scale. The question was clear: **how could they streamline this process without sacrificing consistency or efficiency?**

### SOLUTION

DocumentsCorePack was integrated from the very start of OMICRON's Dynamics 365 rollout, with a clear focus on **creating a structured and scalable approach to email template management.**

#### 01 ► Centralized Template & Email Management



The solution sits directly within Dynamics, allowing users to **create and maintain multilingual templates**, select the right version effortlessly, and send emails seamlessly without leaving the system. While DocumentsCorePack offers broad document generation capabilities, OMICRON primarily uses it for email templates. This has accelerated communication, reduced administrative effort, and streamlined workflows, particularly for customer training processes.

## 02 ▶ Structured Activity Management



To further enhance efficiency, OMICRON uses ActivityTools across both standard and custom tables. The tool **centralizes documentation of all communication activities**, makes **relevant information easily accessible**, and simplifies the creation of activities linked to the correct records. By reducing errors and saving time, ActivityTools strengthens standard Dynamics functionality and ensures that teams maintain consistent and transparent communication records.

## 03 ▶ Visual Insights at a Glance



SmartBar is integrated into Account and Contact forms to give teams **a clear visual overview of related information**. Using color coding based on defined criteria, it allows users to **quickly identify key relationships**, spot important details, and gain insights directly within the records form. This intuitive visualization streamlines daily operations and **helps navigate complex data structures with confidence**.



## CONCLUSION

By integrating DocumentsCorePack and complementing it with ActivityTools and SmartBar, OMICRON has streamlined its communication and activity management. The combination of multilingual email templates, centralized activity tracking, and clear visual insights has accelerated communication, improved consistency, and increased transparency across global teams. For a company operating in over 170 countries, this structured and scalable setup ensures that customer interactions remain professional, efficient, and aligned worldwide.

**Simplify your workflows & try our solutions!**



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All features and support included



“ DocumentsCorePack has transformed the way we handle CRM processes, making document generation and email communication faster, more efficient, and remarkably intuitive. With its easy-to-use templates and powerful automation, our teams can focus on meaningful customer interactions instead of repetitive administrative tasks. Paired with ActivityTools and SmartBar, we now have centralized visibility of all communications and a clear, visual overview of relationships and key data directly within CRM. Together, these tools not only streamline workflows but also empower our teams to work smarter, stay aligned across regions, and deliver a consistently professional experience to every customer. ”

**Tobias Willam**, Business Systems