



proMX and Microsoft  
technologies: **empowering  
energy and utility companies**

WHITE PAPER



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## Introduction

In the rapidly evolving landscape of energy and utility industries, the ability to adapt to changing market dynamics, regulatory requirements, and technological advancements is paramount. Energy and utility companies face a myriad of challenges, from grid modernization and renewable energy integration to regulatory compliance and customer engagement. To navigate these challenges effectively and drive sustainable growth, companies are optimizing their processes and utilizing modern tools.

With innovative CRM and ERP solutions by Microsoft and proMX, the Microsoft Power Platform, and technologies such as AI, we are at the forefront of empowering organizations with intelligent insights, streamlined processes, and enhanced customer experiences. Tailored solutions addressing the unique needs of energy and utility companies, help optimize operations, improve efficiency, and drive business success.

This white paper explores the specific challenges faced by energy and utility companies, and highlights how Microsoft and proMX can address these challenges effectively. From grid optimization and asset management to customer engagement and more, we delve into the key areas where digital tools and modern technologies offer tangible benefits and measurable results.



**Through real-world case studies and expert insights, this white paper aims to provide energy and utility companies with actionable strategies for unlocking new opportunities, driving innovation, and staying ahead of the competition.**

# Navigating the Top Four Challenges Faced by Energy and Utility Companies

## Asset management

**Challenge:** Utility companies face the challenge of managing infrastructure (for example capacitors, meters, transformers, etc.) while ensuring reliable service delivery. Without effective asset management practices, utilities risk operational disruptions, regulatory non-compliance, and increased maintenance costs due to unexpected equipment failures or premature asset deterioration.

**Solution:** Utility asset management software enables companies to maintain a comprehensive inventory of infrastructure assets, track maintenance schedules, and prioritize investments based on asset condition, risk factors, and regulatory requirements.



Microsoft and proMX technologies can be used to manage assets related to grid infrastructure, such as transformers, substations, and distribution lines. It enables utilities to track asset lifecycle, maintenance schedules, and inventory levels to ensure optimal performance and reliability of the grid.



## Customer engagement and service

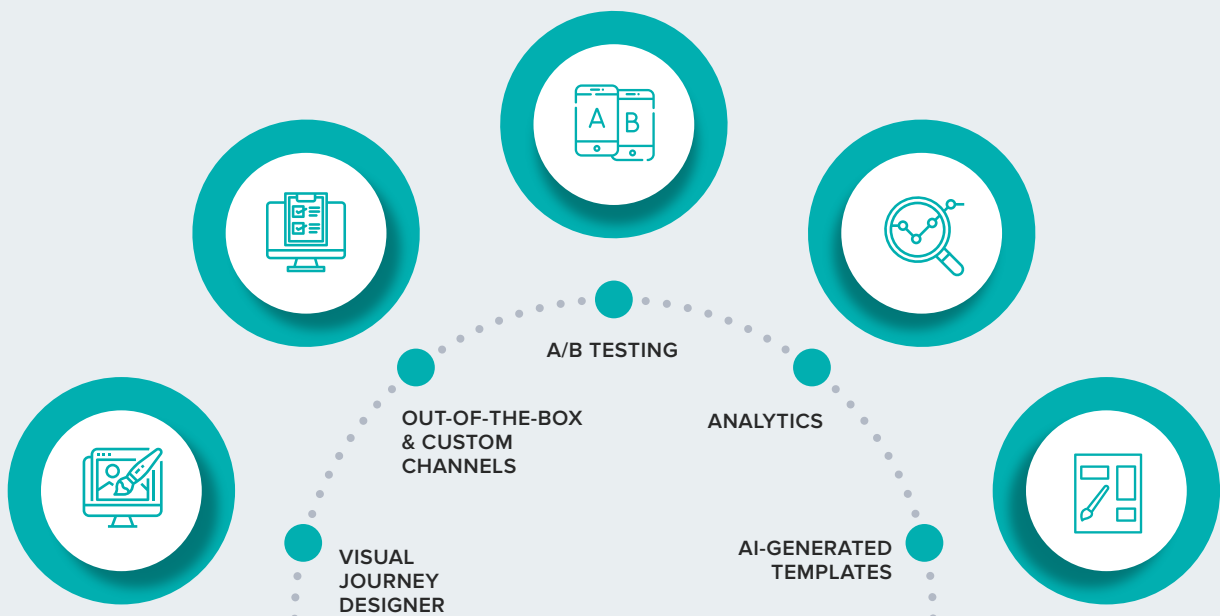
**Challenge:** Meeting evolving customer expectations for personalized services, proactive communication, and self-service options poses a significant challenge for utility companies. Traditional communication channels and manual processes hinder efficient customer engagement, leading to dissatisfaction and increased service inquiries.

**Solution:** Customer relationship management (CRM) software allows utility companies to enhance customer satisfaction by providing personalized services, managing customer inquiries and complaints efficiently, and offering self-service options through online portals and mobile apps.



Microsoft and proMX technologies can be utilized to manage customer inquiries, service requests, and communication related to grid operations and outages. It enables utilities to track customer interactions, prioritize issues, and provide timely updates to customers regarding for example grid status.

## AI-assisted marketing with Microsoft



## Utilizing artificial intelligence for customer engagement

One of the smartest ways to enhance your business is by utilizing the power of artificial intelligence. Microsoft Copilot, launched in 2023, is the perfect assistance for your daily business. It's made to accelerate business workflows while automating routine tasks, to run analyses and to create professional visualizations and project trackers.



### Automation

Streamline tasks, accelerate operations, and personalize customer experiences



### Optimization

Utilize capabilities that help deliver business processes and workflows effectively



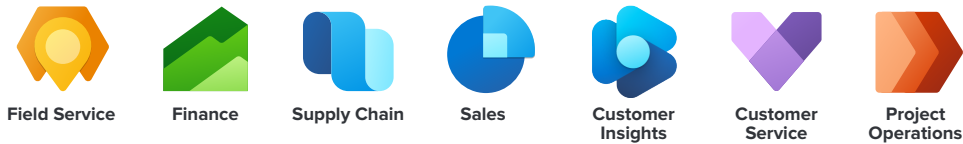
### Insights

Unlock real-time actionable insights to optimize business processes, workflows, and customer interactions

**Make sure to equip each of your business areas with the right technologies to be successful across your entire company.**

### **Copilot for Dynamics 365: AI for every line of business**

Your AI-powered assistant in Dynamics 365. It combines the power of large language models (LLM) with your business data to help every department save time and improve productivity.



### **Copilot for Microsoft 365: AI in the apps you use every day**

Your AI-powered assistant for work. It combines the power of LLMs with your data in the Microsoft Graph to unleash creativity, unlock productivity, and uplevel skills.



### **Copilot for Finance: Transform the way Finance works**

Next-generation AI transforms common finance activities and responsibilities by delivering new insights, reducing the time it takes for complex tasks, and cutting costs.



**Copilot for  
Finance**

### **Copilot for Sales: AI in your CRM**

A seller experience app that uses Microsoft 365 and Microsoft Teams to automatically capture, access, and register data into any customer relationship management (CRM) system.



**Salesforce**



**Copilot for  
Sales**



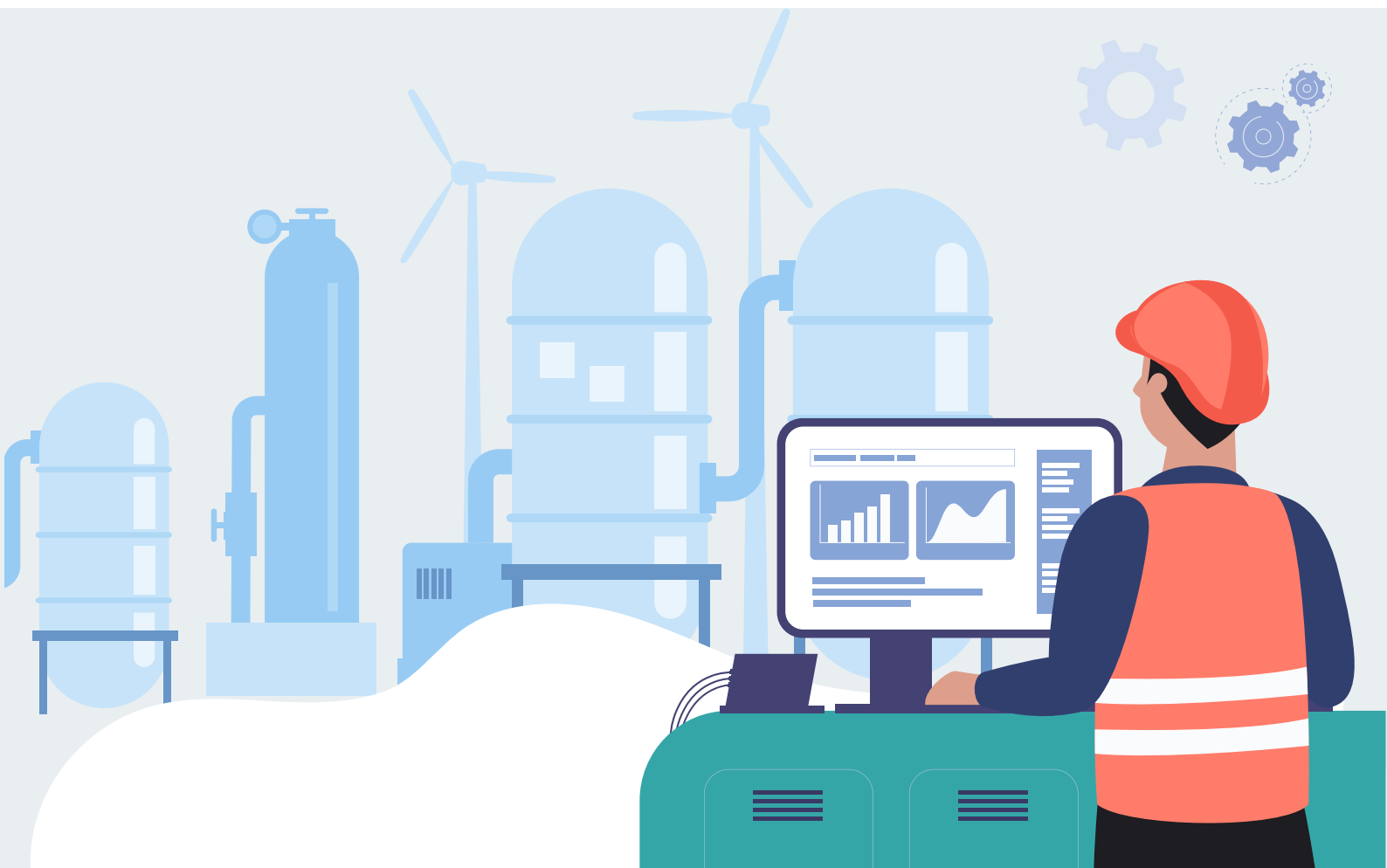
### **Copilot for Service: AI assistant for your service agents**

A service experience application that modernizes existing contact centers with generative AI to enhance customer experiences and boost agent productivity.



### **Copilot Studio: Build your own copilot**

Create and publish a custom copilot for your organization using an intuitive building experience enhanced with LLMs and generative AI.



## Environmental compliance

**Challenge:** Ensuring compliance with environmental regulations and minimizing the environmental impact of operations is a critical challenge for energy companies. Failure to comply with environmental standards can result in regulatory penalties, reputational damage, and legal liabilities, posing significant risks to business continuity and sustainability.

**Solution:** Environmental management software helps energy companies monitor emissions, track environmental permits and regulations, and implement strategies to minimize environmental impact and ensure compliance with air and water quality standards.



Microsoft and proMX technologies offer environmental management capabilities to help energy companies monitor emissions, track environmental permits and regulations, and implement strategies to minimize environmental impact as well as ensure compliance. By utilizing these technologies, companies can demonstrate a commitment to sustainable business practices.

## Project management with Microsoft



### Before the project

Project sales  
Project planning



### During the project

Resource management  
Project management  
Productive collaboration  
Time and expense tracking  
Project controlling



### After the project

Billing  
Reporting

## Data analytics and predictive maintenance

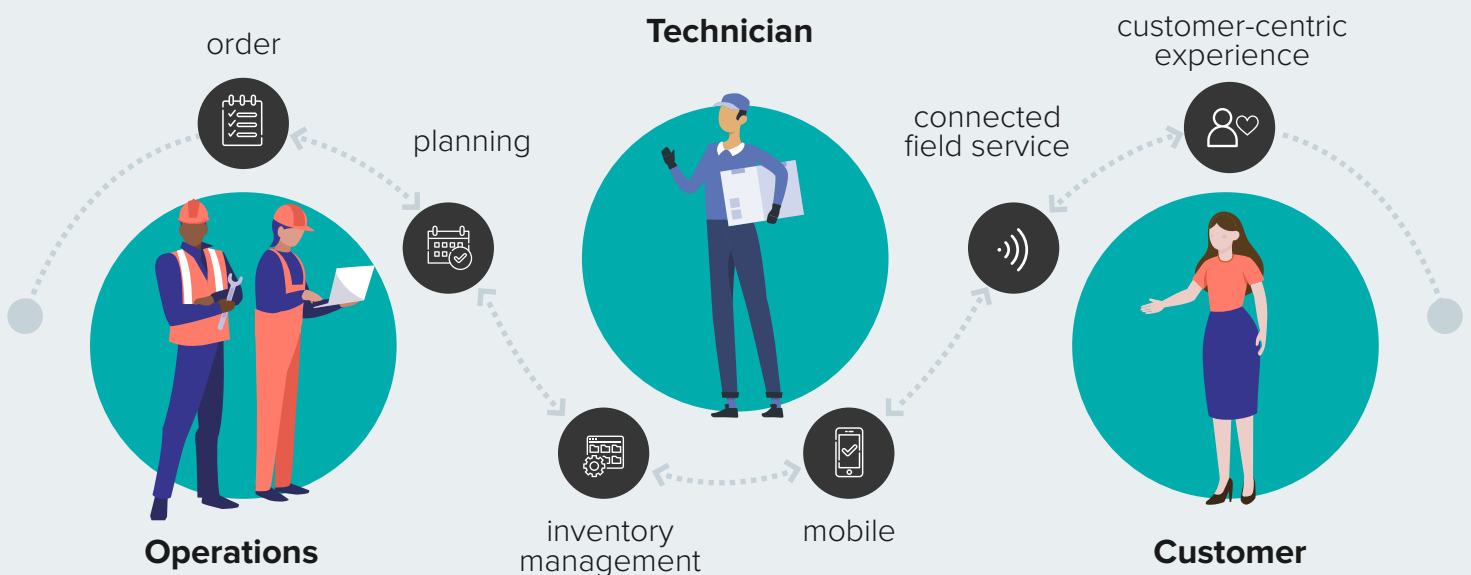
**Challenge:** Managing complex equipment assets and minimizing downtime through proactive maintenance practices is a key challenge for energy companies. Traditional maintenance approaches are reactive and inefficient, leading to increased operational costs, unplanned outages, and reduced equipment reliability.

**Solution:** Predictive maintenance software uses data analytics and machine learning algorithms to optimize equipment maintenance schedules, predict equipment failures before they occur, and minimize downtime and maintenance costs.



Microsoft and proMX technologies offer predictive maintenance capabilities, leveraging data analytics and machine learning algorithms to optimize equipment maintenance schedules, predict equipment failures before they occur, and minimize downtime and maintenance costs. By harnessing the power of predictive maintenance software, companies can transition from reactive to proactive maintenance strategies.

## Field service management with Microsoft



## Custom tools for energy and utility companies

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New, modern technologies should always be implemented with the support of a Microsoft partner. These service providers can advise companies and provide them with more precise information about licensing requirements and prices. They know tried-and-tested implementation methods that keep costs in check, avoid unnecessary disruptions in their daily business and complete the project as fast as possible.

High-profile Microsoft partners (such as those who were or are in the Inner Circle for Microsoft Business Applications) benefit from a special connection to Microsoft and can forward any customer requirements directly to them. A Microsoft partner will also provide support after the go-live or organizes workshops for employees or trainers.

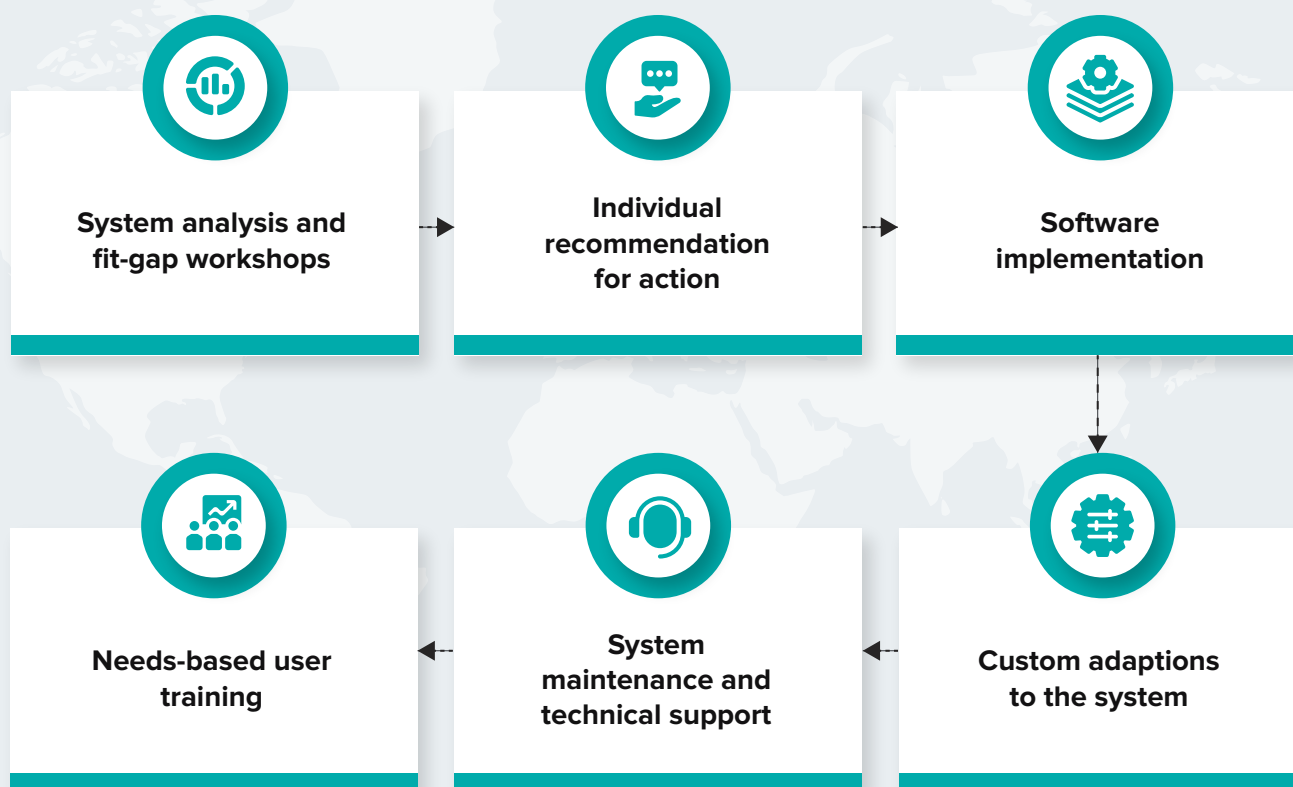


### When looking for an implementation partner, there are certain criteria to look for:

- ✓ Experience with **Microsoft Power Platform, Dynamics 365** and related technologies
- ✓ Industry knowledge and **understanding of internal processes** (necessary to implement requirements and customize the app well; knowing what the solution may be missing)
- ✓ Close relationship with Microsoft
- ✓ Relevant Microsoft competences
- ✓ Relevant customer references
- ✓ Expertise regarding app extensions
- ✓ Holistic consulting

One thing we have noticed is that many projects fail because companies take on too much at once. That is why we recommend an iterative approach with clearly defined and measurable goals. Employees in particular benefit from not getting deterred or overworked.

They analyze processes, requirements and goals, and give recommendations based on their evaluation. They are both a service provider and a partner in a close partner-customer relationship. The digitalization projects of proMX can be structured as follows:



**If you're interested in discussing a potential next project with us, the simplest way is to give us a call!**

**REQUEST WORKSHOP NOW >>**

## Case studies

### Uniper: A surge of energy

proMX has experience with working with different companies from the energy and utilities sector, and offering them a helping hand with their software projects. Learn how these companies were able to optimize their processes with modern and customizable tools.






#### The project:

**Organization:** Energy & Utilities enterprise

**Country:** Germany

**Products:**

-  Dynamics 365 Sales,
-  Dynamics 365 Project Service Automation,
-  SharePoint

**Summary:**

- ✓ Successfully transformed project business by replacing makeshift solution with a professional and fully customizable software for project and resource management
- ✓ Project cycle complemented by Dynamics 365 Sales
- ✓ SharePoint integration for Dynamics 365 to improve document management

# uni per

## About the company

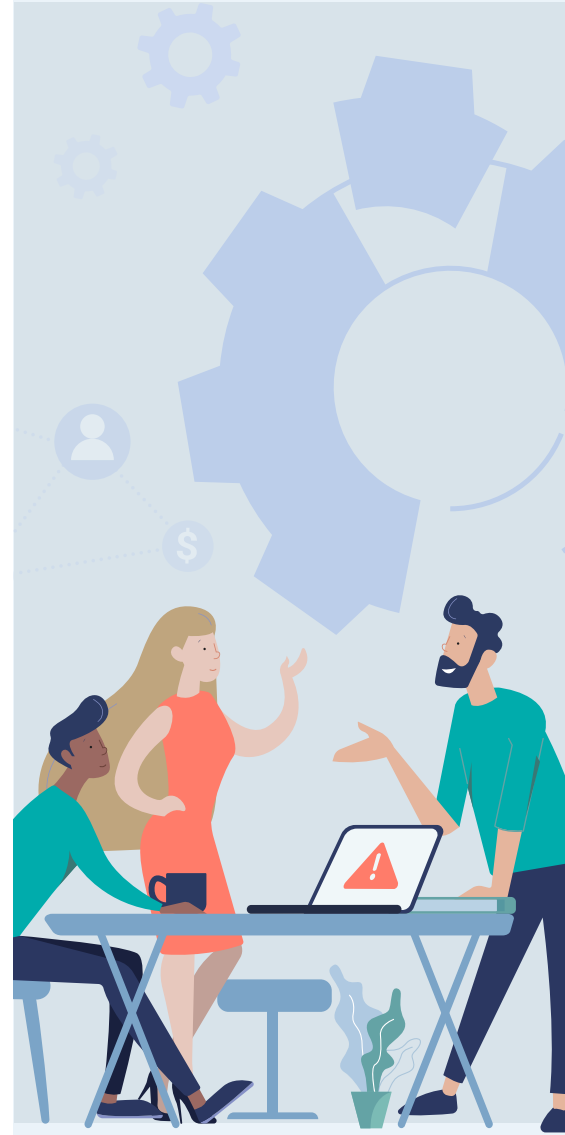
The company started out as a local electricity provider and has become a leading national energy provider. It provides electricity to households and businesses on several continents – with a continuous increase in sustainable sources.

## Initial situation

The company's projects, e.g. shutting down a nuclear power plant, are complex and demand a lot of time, skill and precise planning. For the longest time, it managed its projects in Excel. However, with Excel not being a project management tool, its project management capacities are limited and started to cause problems for the project managers. They included a lack of project summaries for resources, duration times and other important details. Resource management and project planning became too difficult to handle in a spreadsheet program.

For the company it is particularly important to keep track of its pipeline and to be able to make precise predictions due to the nature of its projects.

During the project cycle, many documents such as plans, contracts and blueprints are generated and studied. Aside from storing this data, administrating access privileges is a challenge, too. Many documents are highly confidential, and access needs to be strictly controlled. The company had already had SharePoint in place to manage its documents. Integrating it with Dynamics 365 turned out to be highly complex though.



## Challenges

The number of projects related to renewable energy sources is constantly growing, for example building offshore wind parks. Internal processes needed to be optimized to be able to manage these projects particularly efficiently. Excel as a makeshift project management solution had to be replaced.

Resource requirements for projects had to become more predictable, too: How many consultants are needed for a project and how long would they be working on it?

Regarding their document management, it was important for the customer to manage collaboration and accesses from within the project. Due to the confidentiality of many documents, security was a particularly important aspect.



Implement project management solution



Improve resource management



Improve collaboration & document management

## Solution

proMX supported the company with the implementation of Microsoft Dynamics 365 Sales as well as the project management solution Dynamics 365 Project Service Automation (PSA).

To be able to manage all documents in one place, SharePoint was integrated to Dynamics 365. A modern SharePoint solution for document management that meets the requirements of the company replaced the old solution.



Dynamics 365 Project Service Automation helps the company not only pre-plan projects, but predict resource requirements, too. As soon as a contract is signed, project managers are able to take on a won project immediately and assign employees with the necessary skills to it months or even years prior. During the project status and progress can be controlled in detail at any time. With PSA, the energy provider has a comprehensive overview of its projects and resources.

With a solution specifically tailored to energy companies, the folder structure in SharePoint adapts automatically according to the progress of the project. Access privileges are managed directly in Dynamics 365, too. The coherent folder structure with dedicated privileges all users are able to find important documents easily and quickly.

# We offer a helping hand in your software projects

The ideal implementation partner is not only an expert in theory and technology but also in its customer's industry. Our consultants are familiar with the processes, priorities and challenges of different sectors. Contact us!

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