

DATEV empowers smarter sales with Microsoft Dynamics 365 transformation

DATEV partners with Capgemini to transform its CRM landscape using Microsoft Dynamics 365, enabling smarter, more connected customer experiences and empowering sales teams

DATEV eG, founded in 1966, is one of Germany's leading IT service providers for tax consultants, auditors, and their clients. As the country's third-largest software company, DATEV supports a network of over 749,800 customers with a workforce of more than 9,000 employees.

Considering today's increasingly fast-paced and digital market, DATEV recognizes the growing need to deliver seamless, personalized customer experiences while maintaining agility and operational efficiency. To meet these demands, the company is reimagining how its sales teams connect with clients, manage relationships, and collaborate across systems. The decision to transform its CRM landscape was driven by a strategic need to better support customer-centric growth, improve internal collaboration, and respond more effectively to the evolving expectations of modern users and customers.

Client: DATEV

Region: Germany

Industry: IT software & services

Client challenge: To support customer-centric growth, improve internal collaboration, and meet rising expectations from both customers and end users, DATEV needed to modernize its CRM landscape through a strategic transformation.

Solution: In close collaboration with Capgemini, DATEV started the implementation of Microsoft Dynamics 365 as part of a structured transformation process to modernize sales and enhance customer experience.

Benefits:

- Enhanced customer engagement through better data visibility and tailored communication
- Improved collaboration across departments to ensure consistent client experience
- Better scalability with flexible, future-proof processes
- Expansion of data-driven decision making across sales operations
- Increasing efficiency through automation and Copilot-powered support

To bring this vision to life, DATEV chose Capgemini as its transformation partner. This decision was rooted in a long-standing and trusted collaboration across previous projects, combined with Capgemini's deep expertise in Microsoft Dynamics 365 and a proven track record of delivering successful CRM transformations. With Capgemini's support, DATEV is well-positioned to drive meaningful change and unlock new value for both its employees and customers.

From legacy to future-ready

The transformation began with a clear ambition: empowering sales teams with the tools and insights needed to build deeper, more meaningful relationships with clients. Moving away from a legacy system was not just a technical upgrade and instead represented a strategic decision to align sales operations with the evolving expectations of modern customers. Microsoft Dynamics 365 was selected as the foundation for this shift, enabling DATEV to deliver more personalized, responsive, and value-driven interactions.



Through this project, the company intended to enhance customer engagement through better data visibility and tailored communication, improve collaboration across departments, and support scalable growth with flexible, future-proof processes. Additionally, the transformation aimed to enable data-driven decision making, provide a 360-degree customer view, and increase efficiency through automation and Copilot-powered support.

In close collaboration DATEV and Capgemini established a lean and agile project governance structure that ensured clear roles and responsibilities, which were always defined in tandem between business and IT. This dual leadership model fostered alignment between all stakeholders and enabled fast, informed decision-making throughout the project.

Capgemini supported DATEV in setting up a milestone-driven delivery approach, anchored in a well-defined project plan and concrete scoping for each phase. This gave teams the clarity and orientation needed to stay focused and deliver results. This set up maintained flexibility while simultaneously ensuring structure, allowing the transformation to progress efficiently and remain responsive to evolving needs.

Sales re-imagined

This sales transformation delivers a unified 360-degree view of customer data and sales activities, enabling sales teams to respond faster and more precisely to individual customer needs. In addition, improved data quality and process visibility supports data-driven decision making and more relevant, timely offers that reflect each customer's current situation.

At the same time, sales teams now enjoy more intuitive user experience, resulting in smoother interactions and less friction for customers during consultations. The automation of routine tasks through integrated Microsoft Copilot support frees up time for personalized advice, proactive customer engagement, and higher-value interactions. Finally, standardized processes across departments now ensure consistent communication and reliable service delivery from first contact to contract closure and beyond.

Overall, this transformation empowers people and processes to work smarter and more effectively to improve the customer and end user experience.

In July 2025, DATEV launched a pilot version of Microsoft Dynamics 365 for a select user group. The initiative provided valuable real-world validation and was met with consistently positive feedback from users, confirming the strategic direction of the transformation and laying a strong foundation for the next steps.

Building on this momentum, the full rollout of Microsoft Dynamics 365 is scheduled for February

2026. By then, approximately 1,300 sales employees are expected to use the platform as part of their daily work. Following the rollout, they will benefit from streamlined processes, improved efficiency, and a noticeably enhanced user experience.

The joint approach - characterized by agile methodologies, a clear governance framework, and a shared understanding of business priorities - has proven highly effective in driving progress and delivering measurable value across the organization.

Looking ahead, DATEV is preparing to extend the transformation into Customer Service and Field Service, building on the solid foundation established in Sales. The partnership continues to focus on delivering long-term value, supporting DATEV in shaping a smarter, more connected future with customer needs at the center.



“Our Sales Transformation marks a strategic shift toward a more customer- and user-centric and connected way of working across our sales organization. With Capgemini as a trusted partner, we’ve been able to translate strategic goals into practical solutions - quickly, collaboratively, and with a strong focus on customer experience. This joint approach lays the foundation for future innovation across our customer-facing teams.”

- **Lars Riedel**, CIO, DATEV

About Capgemini

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