



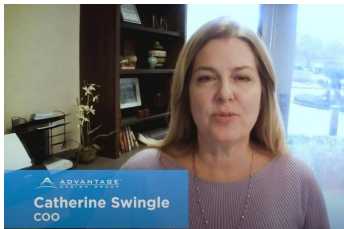
PRESS RELEASE

Optra and Advantage Design Group Announce CRM Modernization Initiative Driving 80% Increase in Lead Capture

FOR IMMEDIATE RELEASE

Jacksonville, FL — January 8, 2026 — **Optra**, a Microsoft Dynamics 365 CRM and Power Platform consulting firm, and **Advantage Design Group (ADG)**, a provider of recruiting and orientation solutions for higher education and private-sector organizations, today announced the successful completion of a CRM modernization initiative that significantly improved sales performance, system visibility, and operational efficiency.

Advantage Design Group transitioned from a legacy CRM platform to Microsoft Dynamics 365 to support a more modern, web-based approach. However, without specialized Dynamics expertise, the organization encountered early challenges, including escalating database storage costs, inconsistent sales processes, and limited visibility into the sales pipeline.



“Our sales team wasn’t aligned around a consistent process, opportunities were being missed, and sales leadership had very little visibility into where deals stood,” said Catherine Swingle, Chief Operations Officer at Advantage Design Group. **“At the same time, we were seeing alerts around database growth and increasing storage costs, which raised real concerns.”**

To address these challenges, ADG partnered with Optra to stabilize and optimize its Dynamics 365 environment. The engagement began with a discovery-driven consultation focused on understanding ADG’s current and future business processes before implementing technical changes.



“What stood out about Optra was Ryan’s hands-on involvement and his focus on understanding how our organization actually operates,” Swingle said. **“That business-first approach made all the difference.”**

Rather than pursuing a large, disruptive overhaul, Optra and ADG collaborated on a phased improvement roadmap delivered through the Optra Care Plan, Optra’s continuous improvement engagement model. This approach allowed enhancements to be implemented incrementally while staying within budget and internal capacity.

Key outcomes of the initiative included:

- Reduced unnecessary database storage and mitigated escalating infrastructure costs
- Empowered ADG’s internal applications administrator with tools and knowledge to sustain improvements
- Implemented automated sales workflows to guide sellers through a consistent, repeatable process
- Improved sales leadership visibility across pipeline activity and performance

The impact on revenue performance was immediate.



“We’ve experienced an 80% increase in lead capture,” Swingle noted. **“Not only are we saving money, but we’re making more money. The improvements to our sales process have been dramatic.”**

Beyond technical optimization, the partnership enabled ADG to avoid overstaffing and unnecessary vendor spend by leveraging specialized expertise as needed.

“Having the right team members involved at the right time was critical,” Swingle added. **“Outsourcing to Optrua made far more sense than hiring or overstaffing for highly specialized projects.”**

Both organizations emphasized that the engagement represents an ongoing partnership rather than a one-time initiative.

“We feel confident knowing we have a partner who can help us continuously improve our operations and our team’s productivity as we grow,” Swingle said.



“This collaboration reflects exactly how we believe CRM and sales systems should be approached,” said Ryan Redmond, CEO of Optrua.

“Smarter systems, implemented with intention and aligned to real business processes, create better outcomes for sales teams and leadership alike.”

About Advantage Design Group

Advantage Design Group provides recruiting and orientation solutions for higher education institutions and private-sector organizations. ADG helps organizations create welcoming, effective experiences for new enrollees through thoughtful design, process, and technology alignment.

About Optrua

Optrua is a Microsoft Dynamics 365 CRM and Power Platform consulting firm that helps organizations modernize systems, improve sales performance, and enable continuous improvement. **Optrua’s mission is simple: Smarter Systems. Better Sales.**

Learn more at <https://optrua.com>

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