



## PRESS RELEASE

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

## FOR IMMEDIATE RELEASE

**Jacksonville, FL — January 8, 2026** — Optraua, 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 Optraua 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 Optraua 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, Optraua and ADG collaborated on a phased improvement roadmap delivered through the Optraua Care Plan, Optraua’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 Optra 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.



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**"This collaboration reflects exactly how we believe CRM and sales systems should be approached,"** said Ryan Redmond, CEO of Optra.

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

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## 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 Optra

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

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

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