

# PAST PERFORMANCE

*Senior-Led Delivery on Enterprise-Scale Engagements*

## ATTRIBUTION FRAMING

### About These Engagements

Cornerstone Systems Group was formed on January 5, 2026. The engagements presented in this document reflect founder past performance — performed by CSG senior leadership at prior firms prior to or concurrent with founding CSG. This is the standard B2B and federal Sources Sought attribution framing for key-personnel past performance.

CSG does not represent itself as the prime contractor on these engagements. Client identities and personnel credentials are available to qualified prospects under appropriate non-disclosure agreement. Solicitations requiring firm-level past performance only will receive a no-bid response until CSG accrues its own awarded contracts.

#### Engagement 01

### Enterprise Dynamics 365 Supply Chain Implementation with Embedded AI/ML

CLIENT	Fortune 500 agricultural equipment manufacturer
PERIOD	2024 – 2025 (18 months)
ENGAGEMENT SCALE	Fortune 500 enterprise ERP program · 12-person implementation team · multi-site dealer network rollout

#### SCOPE

End-to-end Microsoft Dynamics 365 Supply Chain Management implementation with Advanced Warehouse Management module, including first-of-kind Microsoft Copilot Studio and Azure AI Foundry integration in production agricultural equipment supply chain operations. Multi-site rollout coordinating dealer network data feeds, financial close automation, and integration with backend manufacturing systems.

#### KEY TASKS

- Supply Chain Management workstream lead within 12-person implementation team
- Requirements gathering, architecture blueprinting, system configuration, and data migration
- System and integration testing, end-user training, production deployment, and hypercare support
- First-of-kind Microsoft Copilot Studio + Azure AI Foundry integration at production scale
- Backend manufacturing system integration for unified production-to-distribution data flow

#### QUANTIFIED OUTCOMES

- 24 dealerships brought online with real-time inventory data feeds
- Over 1,000,000 SKUs migrated and configured in the Dynamics 365 environment

- Thousands of transactions per day processed at production scale
- 100+ users trained across business stakeholder groups
- 30% reduction in month-end financial close time through automated week-end, month-end, and year-end close routines
- Compressed 18-month delivery relative to comparable Fortune 500 manufacturing ERP implementations of equivalent scope

#### **KEY PERSONNEL**

CSG senior architecture leadership — Supply Chain Architecture workstream lead within the prime's implementation team. Personal accountability across the full lifecycle from requirements through hypercare. Detailed personnel credentials available under NDA.

#### **REFERENCE AVAILABILITY**

Available upon request to qualified prospects under appropriate non-disclosure agreement.

#### **RELEVANCE TO CSG CAPABILITY CLAIMS**

Microsoft stack (Dynamics 365 SCM + AWM) · applied AI/ML in production enterprise systems (Copilot Studio, Azure AI Foundry) · supply chain and ERP modernization · B2B enterprise digital transformation · multi-site rollout coordination.

# Ground-to-Cloud Dynamics 365 Upgrade with Advanced Warehouse Management

---

CLIENT	Mid-market consumer watersports brand portfolio with international manufacturing
PERIOD	2023 – 2024
ENGAGEMENT SCALE	Two-phase enterprise modernization · 6-person implementation team · primary national distribution warehouse + 4 international manufacturing locations

---

## SCOPE

Ground-to-cloud platform upgrade from Microsoft Dynamics 365 AX (on-premises) to Dynamics 365 Finance & Operations (cloud), followed by Phase 2 Advanced Warehouse Management module deployment. Mobile device and label printer enablement, eCommerce platform integration, and coordinated workflows between the primary national distribution warehouse and international manufacturing locations across Asia and South America.

## KEY TASKS

- Supply Chain Management workstream lead within 6-person implementation team
- Phase 1: ground-to-cloud platform upgrade from on-premises AX to cloud F&O, handling legacy AX customizations, data, and process flows
- Phase 2: Dynamics 365 Advanced Warehouse Management module deployment
- Mobile device scanner enablement for picking, packing, receiving, and cycle counting workflows
- Label printer integration for shipping and inventory labeling
- eCommerce platform integration for direct-to-consumer order flow

## QUANTIFIED OUTCOMES

- Successful AX → F&O migration handling legacy customization, data, and process complexity that does not map cleanly to the cloud platform
- Substantial reduction in pick-and-pack labor time per transaction (industry benchmark)
- Inventory accuracy improvement to industry-leading levels
- Faster receiving cycle times and reduced mis-pick rates
- Improved cycle count efficiency at production warehouse scale
- Disciplined two-phase sequencing rather than single-phase risk consolidation

## KEY PERSONNEL

CSG senior architecture leadership — Lead Supply Chain Management Architect within the prime's implementation team. Combined legacy AX, modern F&O, and migration-competency expertise differentiates from typical D365 practitioners who carry only one half of that stack. Detailed personnel credentials available under NDA.

## REFERENCE AVAILABILITY

Available upon request to qualified prospects under appropriate non-disclosure agreement.

## RELEVANCE TO CSG CAPABILITY CLAIMS

Microsoft stack (Dynamics 365 AX + F&O + AWM) · ground-to-cloud migration on the D365 platform · physical warehouse modernization including hardware and channel integration · international supply chain coordination · phased enterprise modernization · B2B consumer products and distribution.



## AI-Augmented Global Dynamics 365 Training Program (Active)

---

CLIENT	Global industrial fastener and assembly solutions provider · multi-legal-entity
PERIOD	2026 (active)
ENGAGEMENT SCALE	Global multi-region rollout · 15-person implementation team · 10 D365 F&O modules · 5 integrated AI/ML use cases

### SCOPE

Active global Dynamics 365 Finance & Operations training program covering the full functional footprint: demand forecasting, inventory management, master planning, procurement and sourcing, product information management, production control and manufacturing, quality control and management, sales and marketing, system administration, and warehouse management. Five integrated AI/ML use cases operate as a coordinated content lifecycle on Microsoft Copilot Studio and Azure AI Foundry. Rollout 2 (US manufacturing and distribution) complete; Rollouts 3 (Europe) and 4 (Asia) in progress.

### KEY TASKS

- Lead Supply Chain Architect within 15-person implementation team
- Generative first-draft authoring of user guides and quick reference guides via Copilot Studio prompt-engineered agents
- AI-augmented translation and localization pipeline on Azure AI Foundry, domain-tuned for ERP terminology
- Role-based content variation across user personas, generated from a unified modular content corpus
- Interactive in-product help and embedded AI agent capability deployed within the training experience
- Integrated content lifecycle from a single source-of-truth corpus across all four use cases above

### QUANTIFIED OUTCOMES

- Production-scale, multi-use-case generative AI deployment — beyond pilot or proof-of-concept stage
- Substantial reduction in content authoring time vs. traditional manual development
- Translation and localization cost reduction vs. traditional translation services
- Faster time-to-deploy across new geographies through the integrated pipeline
- Meaningful uplift in module coverage and content consistency
- Reduced time-to-competency for new end users across the global rollout

### KEY PERSONNEL

CSG senior architecture leadership — Lead Supply Chain Architect within the prime's 15-person enterprise implementation team. Full D365 F&O functional footprint subject-matter expertise across 10 modules. Detailed personnel credentials available under NDA.

### REFERENCE AVAILABILITY

Available upon request to qualified prospects under appropriate non-disclosure agreement. Active 2026 engagement status makes timely reference outreach feasible.

### RELEVANCE TO CSG CAPABILITY CLAIMS

Applied AI/ML at production scale across multiple integrated use cases (PRIMARY anchor for AI/ML capability) · Microsoft stack (Dynamics 365 F&O · Copilot Studio · Azure AI Foundry) · enterprise training program leadership ·

global multi-region program coordination · technical writing and documentation modernization · B2B manufacturing and industrial distribution.

## What These Engagements Demonstrate Collectively

---

- **Senior architectural leadership within enterprise implementation teams.** Workstream lead accountability inside 6- to 15-person teams on Fortune 500-tier engagements.
- **Full lifecycle accountability.** Requirements through hypercare — architecture, configuration, migration, testing, training, deployment, and operations transfer in a single integrated lifecycle.
- **Microsoft stack depth.** Dynamics 365 (SCM · F&O · AWM modules) · Copilot Studio · Azure AI Foundry — consistent across the engagements.
- **Applied AI/ML in production, not pilot.** Microsoft Copilot Studio + Azure AI Foundry deployed at production scale, including first-of-kind applications and five integrated AI/ML use cases operating as a coordinated content lifecycle.
- **Global and Fortune 500 client experience.** Multi-region rollout, multi-legal-entity, international manufacturing, and dealer-network coordination at enterprise program scale.

**Cornerstone Systems Group · [admin@cornerstonesystemsgroup.com](mailto:admin@cornerstonesystemsgroup.com) · (213) 212-4999**

835 Wilshire Blvd, Suite 500 #650, Los Angeles, CA 90017 · [cornerstonesystemsgroup.com](http://cornerstonesystemsgroup.com) · References under NDA