

# How Koester Construction Unified — And Simplified — Sales and Operations With Microsoft Dynamics 365

Koester Construction has grown rapidly since its founding in 1985, and Koester leadership recognized that managing pursuits, projects, and people through spreadsheets and disconnected systems was no longer sustainable. Seeking a single, real-time view of sales and operations, Koester partnered with New Dynamic to implement Microsoft Dynamics 365, centralizing pipeline, client, and performance data and integrating with Procore. The result: greater visibility, smoother collaboration, and a scalable foundation that supports even more growth.

## For over forty years, Koester Construction

has built its reputation on long-term client relationships, repeat business, and a relentless drive to improve its operations and deliver outstanding customer experiences..

The Iowa-based commercial general contractor now works in more than 20 states, delivering multifamily, senior living, automotive, retail, and quick-service restaurant projects nationwide.

But as the company has evolved, so has the complexity and challenge of managing pursuits, pipeline, projects, and people across an organization focused on responsible growth through putting people in a position to succeed.

Koester's business development and forecasting efforts have historically relied on a mix of spreadsheets, Airtable databases, and disconnected operational systems. Procore is the firm's day-to-day construction management platform, but critical sales,

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relationship management, and related activity-reporting data had been stored elsewhere.

"It was somewhat scattered and disorganized," said Ben Koester, CEO of Koester Construction. "We had a lot of different spreadsheets pulling from different locations. It was fairly chaotic and challenging to scale as we've grown and added remote employees."

Koester and the leadership team knew they needed more than just another database. They wanted to create efficiencies by centralizing information, providing visibility into the pipeline and performance, and supporting mobile access for field teams, to eventually integrate with Procore and other core business systems.

With its long track record of successfully serving general contractors, New Dynamic was selected to design and deliver the solution on the Microsoft Dynamics 365 Sales platform.

## Ambition: A Snapshot of the Business

Ben said the goal was to deliver a real-time view of the company's sales and business development health, and to enable planning for short-term execution and long-term growth.

"The Dynamics 365 solution is one of the easier and more seamless ways to centralize everything," said Ben. "CRM and

performance management, plus accounting, can all live in one place. It gives us a snapshot into the health of the company at any given moment, and auto-generates reports that help us make decisions on labor, expenses, and finances.”

New Dynamic proposed a phased approach, starting with deploying Microsoft Dynamics 365 Sales to unify lead tracking, pipeline management, client data, and forecasting. This initial phase established a scalable foundation needed for future functionality.

## Action: A Proven Process Built Around Koester Construction’s Goals

New Dynamic worked with the Koester leadership team to define requirements, map processes, and design a solution aligned with the company’s operating model.

The Phase 1 implementation delivered a Dynamics 365 Sales environment for approximately 80 users across sales, project management, and field leadership. This includes centralized account and contact management, opportunity tracking, and was rolled out with user training to build comfort and adoption.

For Ben, implementing the system was initially concerning, but he quickly found it to be a smooth, well-run, and collaborative process.

“New Dynamic is phenomenal to work with, very transparent, and very organized and clear in their communications,” Ben said. “Our fear at the beginning was going over budget because we had ambitious goals and were breaking new ground, but we came in under budget and got much more than we were expecting in this initial phase.”

Clear scoping and consistent communication kept the project on track.

“It’s essential to understand and have a clear picture of the goals on the front end,” said Ben. “They were very good at making sure we all knew what we were building. Weekly check-ins and status calls kept everything aligned. It’s complicated work, but the consistency and quality of communication made it manageable.”

## Pains & Gains

### Pains

- Scattered spreadsheets and disconnected systems
- Limited visibility into pipeline and performance
- Manual forecasting and reporting, difficult to scale across a growing, remote workforce

### Gains

- Centralized client relationship communications and management
- Real-time pipeline and status transparency
- Scalable foundation for Procore integration and AI-driven insights

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With Phase 1 complete, Koester and New Dynamic are extending the platform in Phase 2 by integrating Procore directly into Dynamics 365 to deliver a comprehensive view of projects, subcontractors, and personnel.

## Outcomes: Productivity And A Platform for the Future

Today, Koester Construction operates with one digital view that connects sales, operations, and performance management across the organization. Teams can view pipeline activity, track communications and customer relationship management, and access project data to plan staffing needs more effectively.

“Transparency of communication has increased dramatically,” Ben said. “On the sales side, anyone can log in and see what stage a lead is in, the last communication, the last budget produced, everything is centralized.”

The system has also become a powerful tool for labor planning and talent management. Koester now maintains performance profiles for team members, tracking projects, strengths, and development goals, enabling smarter resource planning as projects ramp up or conclude.

“We can use that data to project out and know that this person’s project will be done in eight months, so we need the next project lined up for them,” Ben explained. “It allows us to schedule our team more efficiently, which is a big win companywide.”

Ben is enthusiastic about the solution’s capabilities and how they will support further growth and expansion.

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