



Canadian Solar North America Commercial Operating System

Dynamics 365 + AI + Sales Execution + Internal Capability



Prepared for

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THE POTENTIAL OUTCOME

\$25M–\$75M+

Potential annual value from better North American commercial execution.

A properly designed and rapidly executed North American commercial strategy — enabled by Dynamics 365 and AI — could create or protect tens of millions of dollars of annual value at Canadian Solar's FY2025 revenue scale of \$5.612B.

MARGIN

10–30 bps

\$5.6M–\$16.8M

Improved margin protection

EXECUTION

0.5%

~\$22.5M

Against the \$4.5B+ U.S. module backlog

GROWTH

0.5%

~\$28M

Strategic-account penetration and cross-sell

Illustrative value scenarios based on Canadian Solar's reported financial and operating scale. These are not projected or guaranteed results.

THE TEACHING POINT

The Value of CRM Is Not Measured in CRM Metrics

It should be measured in business outcomes.

MARGIN

ACCOUNT PENETRATION

FORECAST ACCURACY

SELLER CAPACITY

BACKLOG EXECUTION

At Canadian Solar's scale, small improvements in commercial execution can create eight-figure economic value.

10 bps of margin

~\$5.6M annually

0.5% on \$4.5B+ backlog

~\$22.5M

0.5% revenue improvement

~\$28M annually

3 hours per seller weekly

~150 hours/yr

The question is not

“How do we successfully implement Dynamics 365?”

The more valuable question is

“Where can better commercial execution create the most economic value — and how quickly can we prove it?”

OUR STRATEGIC THESIS

One Customer. One Commercial View. Multiple Selling Motions.

Utility / Key Accounts

Distribution

C&I

Residential / Channel

Storage

STANDARDIZE

Customer and account hierarchy
Commercial data
Executive visibility
Forecasting
Margin visibility
Governance
Core KPIs

ADAPT BY MOTION

Seller workflows
Opportunity stages
Buying processes
Account strategies
Product and solution motions

CUSTOMER › ACCOUNT › OPPORTUNITY › ECONOMICS › FORECAST › CONTRACT › CAPACITY › DELIVERY › REVENUE

Dynamics 365 provides the commercial backbone. AI helps make the operating model faster, smarter and increasingly proactive.

WHERE WE WOULD CREATE VALUE

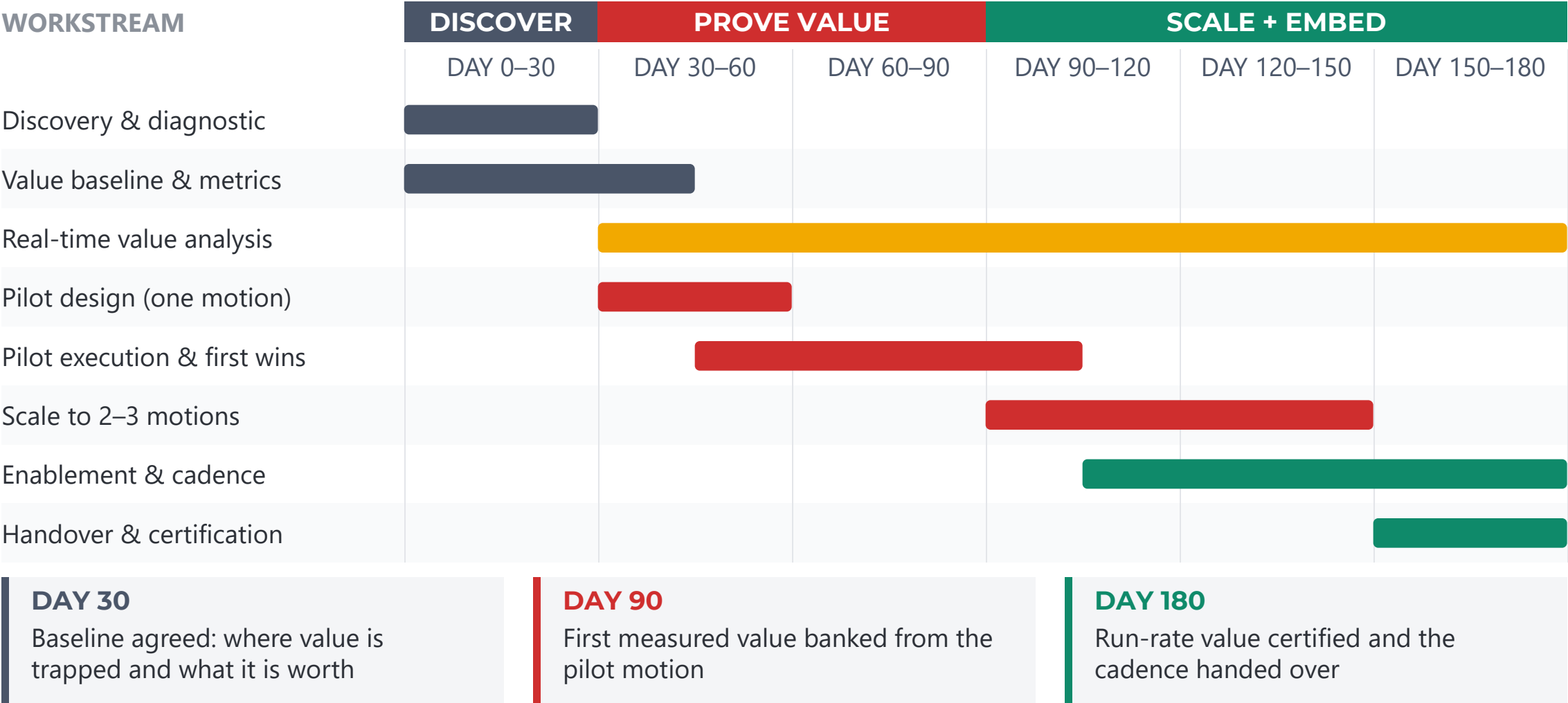
Five Priorities. One Platform. Measurable Outcomes.

Business Priority	CRM Strategy	AI Opportunity	Potential Outcome (illustrative)
Protect profitable growth	Opportunity qualification, pricing and margin visibility, forecast discipline	Deal-risk intelligence, margin signals, next-best actions	10–30 bps margin protection ≈ \$5.6M–\$16.8M
Win and expand strategic accounts	One account model across solar, storage, C&I and channels	Account research, whitespace, relationship intelligence	0.5–1.0% revenue improvement ≈ \$28M–\$56M
Connect demand to execution	Pipeline to contracts to SAP orders to allocation and manufacturing	Demand and capacity signals, delivery-risk prediction	0.5% execution on \$4.5B backlog ≈ \$22.5M
Make sellers faster	CRM designed around how sellers work, not around data entry	Meeting prep, capture, updates, proposals, account planning	Target 3–5 hours per seller per week returned
Build internal capability	Platform, process, data model, governance and ownership	Documentation, training, support, continuous improvement	Lower consulting dependency; internal ownership

Illustrative value scenarios based on Canadian Solar's reported scale — not promised or guaranteed outcomes.

FROM POTENTIAL TO PROOF

Strategy to Execution: A 180-Day Plan



AI OPPORTUNITY MODEL

AI Should Be Built Into the Operating Model

DO

Remove administrative work

KNOW

Bring intelligence to sellers and managers

THINK

Identify risk, opportunity, forecast and margin signals

ACT

Trigger bounded workflows and next-best actions

AGENT EXAMPLES

Account Strategy Agent

Deal Risk Agent

Forecast Agent

Demand / Capacity Agent

Seller Prep Agent

D365 Admin / Vibe365 Agent

Agents are bounded, governed and tied to a business outcome — not an experiment running beside the process.

Strategy to Execution — Without the Consulting Layers

Commercial leadership

12 years in sales leadership; VP Sales and division-level GTM ownership

Microsoft and D365 depth

Sold Dynamics inside Microsoft; partner leadership; hands-on CRM

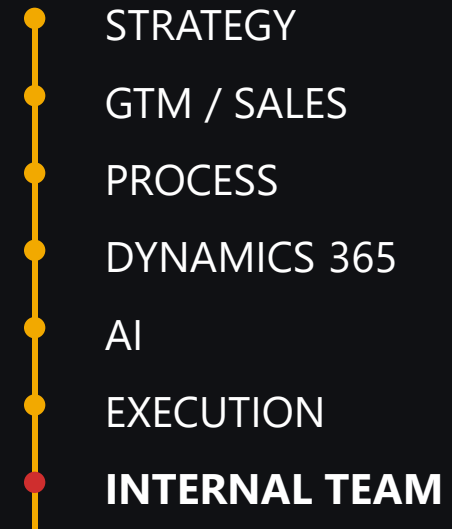
Sector experience

Worked with First Solar on its CRM initiative while at Microsoft

AI and internal team building

Hands-on with agents and Vibe365; recruits permanent D365 talent from an established network

THE AGILIDY MODEL



Agilidy is not a consulting army. It is direct access to one senior operator who can bridge business strategy, sales execution, D365 architecture, AI acceleration and permanent team-building.

THE OPPORTUNITY

What We Showed You

01

POTENTIAL VALUE

At Canadian Solar's scale, modest improvements in margin protection, account penetration and commercial execution can represent tens of millions of dollars of economic value.

02

SPEED TO VALUE

Do not wait months to hire a permanent leader and then begin. Start delivering, testing and measuring value immediately through a focused 90-day engagement.

03

BUILD TO OWN

Use the first 90 days to create momentum, prove the operating model and recruit the Canadian Solar employees who will own and scale it for the next 1, 2 and 5 years.

Start creating value now. Build the team that owns it for the future.