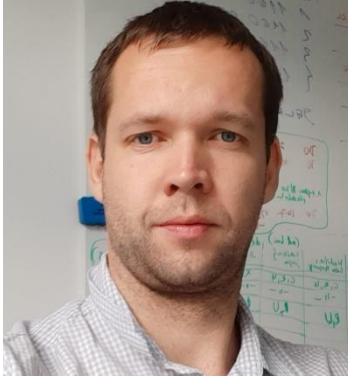

Vít Lachner

Solution architect, Team leader, Senior consultant

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Ústecký kraj, Czech Republic

Solution Architect and consultant with 15 years of experience in Microsoft business applications such as CRM, Customer Service and Power Platform — and in custom web applications where the platform is the wrong answer. Between 2017 and 2025 I led a development and consulting team; since 2025 I work as a freelancer. Focused on comprehensive solution architecture, cloud applications and business process automation with hands-on experience covering the entire project cycle from pre-sales consultations to deployment and support. I have also designed and built an in-house product platform based on Power Platform with strong CI/CD support. Currently I design and deliver AI agents across the platform – declarative ones in Microsoft 365 Copilot, orchestrated ones in Microsoft Copilot Studio – and, thanks to AI-assisted development, run several projects in parallel.

Expertise

- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Customer Insights
- Power Automate
- Power Apps
- CI/CD, DevOps
- C#, .NET
- Web application architecture
- Copilot Studio
- Microsoft 365 Copilot
- AI-assisted development (Claude Code)

Key Qualifications and Skills

- Complex Solution Architecture (CRM, Power Platform, integrations)
- Team Leadership & Development (2→8 people, onboarding, mentoring)
- End-to-End Project Management (presales → deployment → support)
- Microsoft Technologies (Dynamics 365, Power Platform, Azure)
- Long-term Project Sustainability (5-13 years continuous support)
- B2B Integration & Portal Solutions
- Business Analysis & Consulting Leadership
- Strong problem-solving and results-oriented mindset

Selected projects

CRM/Marketing, 2026–present

Implementation and development of Dynamics 365 Sales and Customer Insights for an international group. The solution covers sales management including guided selling sequences, mobile access for field sales and marketing campaigns with consent management according to local legislation. It included data migration, integration with external systems and rules for citizen development.
Segment: International manufacturing group

AI agents for sales and customer communication, 2026

Analysis and implementation of AI agents automating the processing of incoming e-mail communication. The main agent recognises the message type on its own (inquiry, payment, travel documents), creates or updates the opportunity in CRM and reports the result to the team in Microsoft Teams – with no manual step. A second agent helps salespeople quickly look up the state of a deal, the client and payments.
Segment: Travel services

CRM, 2013–2025

Analysis and implementation of CRM solution version Dynamics CRM 2013 with subsequent support. Analysis of transition to Dynamics 365 Sales with subsequent implementation. Migration project extended with integrations to Dynamics NAV ERP. New solution covers complete quotation process for two divisions with different business processes.
Segment: Premium glass and lighting manufacturer

CRM, 2012–present

Support of Dynamics CRM 2011 solution with continuous development to support business processes, primarily in the area of efficient quote creation for engineering units. Upgrade to Dynamics 365 8.2. Solution stabilization and migration to cloud version Dynamics 365 Sales (Online). Solution support with development into comprehensive CRM solution for business process support. The solution is heavily integrated with Helios ERP.
Segment: Aluminum structures manufacturer for event industry

SRM and Portal, 2019–2025

Analysis and implementation of solution based on Dynamics 365 Sales and Power Pages portal with subsequent support. The solution provides coverage of supplier onboarding processes (translations, specialized services, etc.), maintaining business relationships (data updates, campaigns, pricing, etc.) through a portal for suppliers and Dynamics 365 for internal coordinators and managers. Processes are tightly coupled through integration with Dynamics NAV ERP and other applications such as for testing, document storage, etc. The portal is regularly used by over 100 new or existing suppliers.
Segment: Language and localization services provider

Languages

- Czech – native
- English – B2

Industries

- Sales
- Manufacturing
- Logistic

Education

University of West Bohemia in Pilsen
Faculty of Applied Sciences,
Master's Degree: Software Engineering

Project History

CRM, 2011–2025

Upgrade Dynamics CRM 4.0 to 2011. Upgrade Dynamics CRM 2011 to Dynamics 365 8.2. Analysis and implementation of enhancements for the quotation process of packaging machines and packaging. The solution was enhanced with support for service processes. Processes are supported by integration with Dynamics NAV ERP. Long-term support and development of CRM into a comprehensive solution supporting sales and service.

Segment: Trade and services in packaging industry

Responsibility:	Analysis, design, implementation
Role:	Solution architect, consultant, developer
Technology:	Dynamics CRM, Dynamics 365 Customer Engagement (OnPremise), .NET, Documents Core Pack, integrations

B2B Web Portal, 2011–2015

Support of the first version of B2B portal for handling partner registration processes, fleet management and card management. Design and implementation of new B2B portal solution with original scope extended by providing information to partners. Extension of integration with Dynamics NAV for more efficient information provision to partners. Solution handover to internal development by the client.

Segment: Fuel card and fleet management provider

Responsibility:	Analysis, design, implementation
Role:	Solution architect, consultant, developer
Technology:	ASP.NET, .NET, integrations

Project History

CRM, 2013–2025

CRM, 2012–present

Support of the Dynamics CRM 2011 solution with continuous development of the sales process, mainly efficient quotation of engineering structures. Upgrade to Dynamics 365 8.2, stabilisation and migration to the cloud version of Dynamics 365 Sales (Online). Ongoing support and development into a complex CRM solution for sales processes. The solution is strongly integrated with the Helios ERP.

Segment: Aluminium structures manufacturer for the event industry

Responsibility:	Analysis, design, implementation
Role:	Solution architect, consultant, developer, integrations
Technologies:	Dynamics CRM 2011 (2015), Dynamics 365 Customer Engagement (OnPremise), Dynamics 365 Sales, Documents Core Pack, integrations

Analysis and implementation of CRM solution version Dynamics CRM 2013 with subsequent support. Analysis of transition to Dynamics 365 Sales with subsequent implementation. Migration project extended with integrations to Dynamics NAV ERP. New solution covers complete quotation process for two divisions with different business processes.

Segment: Premium glass and lighting manufacturer

Responsibility:	Analysis, design, implementation
Role:	Solution architect, consultant, developer
Technology:	Dynamics CRM 2013, Dynamics 365 Customer Engagement (OnPremise), Dynamics 365 Sales, Documents Core Pack, integrations

CRM, 2015–2025

Analysis and implementation of CRM solution version Dynamics CRM 2015 with subsequent support. The solution provides coverage of business processes for public and private sector. Business processes are supported by integration with Dynamics NAV ERP. Solution management is facilitated by extended Active Directory integration for user and license management.

Segment: Waste management services company

Responsibility:	Analysis, design, implementation
Role:	Solution architect, consultant, developer
Technology:	Dynamics CRM 2015, integrations

CRM, 2015–2025

Analysis and implementation of CRM solution version Dynamics CRM 2016 with subsequent support. The solution provides coverage of business processes for printer sales and related services. Business processes are supported by integration with Dynamics NAV ERP. Deployment was carried out with high emphasis on solution and data security.

Segment: Office equipment and printing solutions provider

Responsibility:	Analysis, design, implementation

Project History

Role: Solution architect, consultant, developer

Technology: Dynamics CRM 2016, integrations

CRM, 2018–2025

Analysis and implementation of CRM solution version Dynamics 365 Sales with subsequent support. The solution provides coverage of business and service processes for a major manufacturer of electrical equipment for industrial use. Processes are tightly coupled through integration with Dynamics NAV ERP.

Segment: Industrial electrical equipment manufacturer

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Dynamics 365 Sales, integrations

SRM and Portal, 2019–2025

Analysis and implementation of solution based on Dynamics 365 Sales and Power Pages portal with subsequent support. The solution provides coverage of supplier onboarding processes (translations, specialized services, etc.), maintaining business relationships (data updates, campaigns, pricing, etc.) through a portal for suppliers and Dynamics 365 for internal coordinators and managers. Processes are tightly coupled through integration with Dynamics NAV ERP and other applications such as for testing, document storage, etc. The portal is regularly used by over 100 new or existing suppliers.

Segment: Language and localization services provider

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Dynamics 365 Sales, Power Pages, integrations

CRM, 2020–2025

Analysis and implementation of CRM solution version Dynamics 365 8.2-9.1 (On-Premise) with subsequent support. The solution provides coverage of business and service processes for forklifts. Processes are tightly coupled through integration with Dynamics NAV ERP for unification of important data, where main data is for quote creation according to forklift configuration. Part of support also includes regular updates of Dynamics 365 to the latest On-Premise versions.

Segment: Material handling equipment provider

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Dynamics 365 8.2-9.1 (On-Premise), DocumentsCorePack, integrations

CRM, 2022–2025

Analysis and implementation of CRM solution built on an in-house product platform (Power Apps) with subsequent support. The project goal was to provide sales representatives with a modern tool for sales management and sharing customer information (meetings, products).

Project History

Segment: Trading company

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: in-house product platform, Power Apps, Power Automate

CRM, 2023–2025

Analysis and implementation of CRM solution built on an in-house product platform (Power Apps) with subsequent support. The project goal was to replace the original product that no longer met modern concepts. The solution provides coverage of sales, service and warehouse processes for the audiovisual technology segment.

Segment: Audiovisual equipment provider

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: in-house product platform, Power Apps, Power Automate

CRM, 2023–2025

Analysis and implementation of CRM solution based on Dynamics 365 Sales with subsequent support. The original solution was taken over and subsequently safe handover to a new team was ensured with the goal of supporting future solution development in sales and logistics with components for the pharmaceutical industry.

Segment: Pharmaceutical company (distribution and logistics)

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Dynamics 365 Sales, Power Apps, Power Automate

Construction Production Management and Electronic Construction Log, 2023–2025

Analysis and implementation of a central application supporting construction production processes. The processes include construction production management and electronic construction log. The application is accessible via web interface and mobile interface including offline mode. The mobile application is available in Apple and Google stores.

Segment: Construction holding company

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Next.JS, React, .NET, integrations

Electronic Personnel File, 2024–2025

Analysis and implementation of central application supporting HR processes. Processes include all HR department activities. The application allows user permissions management. Users create processes themselves using an integrated process designer with the ability to create and model agendas according to current and future needs.

Segment: Construction holding company

Project History

Responsibility: Analysis, design

Role: Solution architect, consultant

Technologies: Next.JS, React, .NET, integrations

Service Application, 2025–present

Analysis and implementation of a Power Platform application supporting the service sales process – from opportunity through calculation to a versioned quotation. The solution is connected to enterprise systems for ERP, product data management and project planning, so salespeople work with current data without manual re-entry. It also covers a guided sales process and document management.

Segment: Mechanical engineering

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Vibe coding, AI, Dynamics 365 Sales, Power Apps, Power Automate, PCF, integrations

CRM/Marketing, 2026–present

Implementation and development of Dynamics 365 Sales and Customer Insights for an international group. The solution covers sales management including guided selling sequences, mobile access for field sales and marketing campaigns with consent management according to local legislation. It included data migration, integration with external systems and rules for citizen development.

Segment: International manufacturing group

Responsibility: Analysis, design, implementation

Role: Solution architect, consultant, developer

Technologies: Vibe coding, AI, Dynamics 365 Sales, Customer Insights – Journeys, Power Apps, Power Automate, PCF, integrations

Thesis Management, 2026

Analysis and implementation of an application managing the full lifecycle of master theses – from student registration through approval to document management. Students register through an AI agent in Microsoft Teams in two languages and notifications are sent automatically from the faculty shared mailbox. The solution was handed over to the customer environment.

Segment: University

Responsibility: Analysis, design, implementation

Role: Solution architect, developer

Technologies: Vibe coding, AI, Copilot Studio, Power Apps, Power Automate, SharePoint, Microsoft Graph, Azure

AI agents for sales and customer communication, 2026

Project History

Analysis and implementation of AI agents automating the processing of incoming e-mail communication. The main agent recognises the message type on its own (inquiry, payment, travel documents), creates or updates the opportunity in CRM and reports the result to the team in Microsoft Teams – with no manual step. A second agent helps salespeople quickly look up the state of a deal, the client and payments.

Segment: Travel services

Responsibility:	Analysis, design, implementation
Role:	Solution architect, developer
Technologies:	Vibe coding, AI, Copilot Studio (multi-agent), Microsoft 365 Copilot, CRM, Microsoft Teams, Outlook, Power Automate

AI generation of production documents, 2026–present

Analysis and implementation of an AI agent preparing internal planning documents and meeting minutes in the corporate template. Users receive a finished, editable document in their usual tools instead of lengthy manual preparation.

Segment: Manufacturing company

Responsibility:	Analysis, design, implementation
Role:	Solution architect, developer
Technologies:	Vibe coding, AI, Copilot Studio, Agent Skills, Python, PowerPoint, Word

Employment History

12/2025 – present, Prague, Czech Republic

Solution Architect, Consultant, Power Platform Developer – ACTUM Digital (freelancer)

- Solution architect for Power Platform and Dynamics 365 (Sales, Customer Insights).
- User requirements consultation and analysis.
- Development process optimization and project development leadership.
- Vibe coding, AI, Power Apps, .NET, C#, JavaScript.

12/2025 – present, remote, Czech Republic

Solution Architect, Consultant – aluminium structures manufacturer for the event industry (freelancer)

- Long-term solution architect for Dynamics 365 Sales.
- Maintenance and development of the CRM solution, looked after since 2012.
- Internal intranet process applications.
- Vibe coding, AI, Dynamics 365 Sales, Power Platform, integrations.

02/2011 – 11/2025, Ústí nad Labem, Czech Republic

Solution Architect, Consultant, Developer - SEYFOR, a.s. (CDL System, Solitea CDL)

- Solution architect for CRM and web applications
- User requirements consultation and analysis
- Development process optimization and project development leadership
- Dynamics CRM, Dynamics 365 Sales/Customer Service

Employment History

• .NET, C#, JavaScript, Power Apps

07/2009 – 01/2011 – Ústí nad Labem, Czech Republic

.NET Developer – Krajská zdravotní a.s.

• Internal user requirements analysis and solution design
• Process optimization
• User support and training
• .NET web and integration developer – ASP.NET, .NET, C#

07/2008 – 04/2009 – Agropol Group a.s., Prague, Czech Republic

Backend/Frontend Developer ERP system Agropol Group a.s.

• Java, Hibernate, JSP

Certification and trainings

ClickDimensions Certified - ClickDimensions Partner Onboarding, 2019, Click!

Microsoft Certified: Power Platform Solution Architect Expert, 2023, Microsoft certification

Microsoft Certified: Power Platform Developer Associate, 2021, Microsoft certification

Exam 715: Microsoft Dynamics 365 customer engagement Online Deployment, 2017, Microsoft certification

Exam 716: Microsoft Dynamics 365 Customization and Configuration, 2017, Microsoft certification

Exam 716: Microsoft Dynamics 365 Customization and Configuration, 2017, Microsoft certification

Exam 717: Microsoft Dynamics 365 for Sales, 2019, Microsoft certification

MCSA: Dynamics 365 - Certified 2017, 2017, Microsoft certification

MS: Microsoft Dynamics CRM 2016 Online Deployment, 2016, Microsoft certification

MCPS: Microsoft Certified Professional, 2015, Microsoft certification

MS: Microsoft Dynamics CRM 2013 Applications, 2015, Microsoft certification

MS: Microsoft Dynamics CRM 2013 Deployment, 2015, Microsoft certification

MCTS: Microsoft Dynamics CRM 2011 Applications, 2012, Microsoft certification

MCTS: Microsoft Dynamics CRM 2011 Installation and Deployment, 2012, Microsoft certification

Trainings (trained)

Proč se s někým domluvím a s někým to jde hůře (Why I Can Reach an Agreement with Some People and with Others It's More Difficult), Václav Vinklárek, 2025
Principy pozitivní komunikace (Principles of Positive Communication), Václav Vinklárek, 2025
Content Aspects of Consulting Work, Václav Vinklárek, 2025