

WHAT IS CRM Smart Start?

CRM Smart Start is a best practice framework for implementing Microsoft Dynamics CRM that is built on setting goals that are specific, measurable, achievable and time-bound. CRM Smart Start is simple, requires very little capital investment and can expand with business needs.

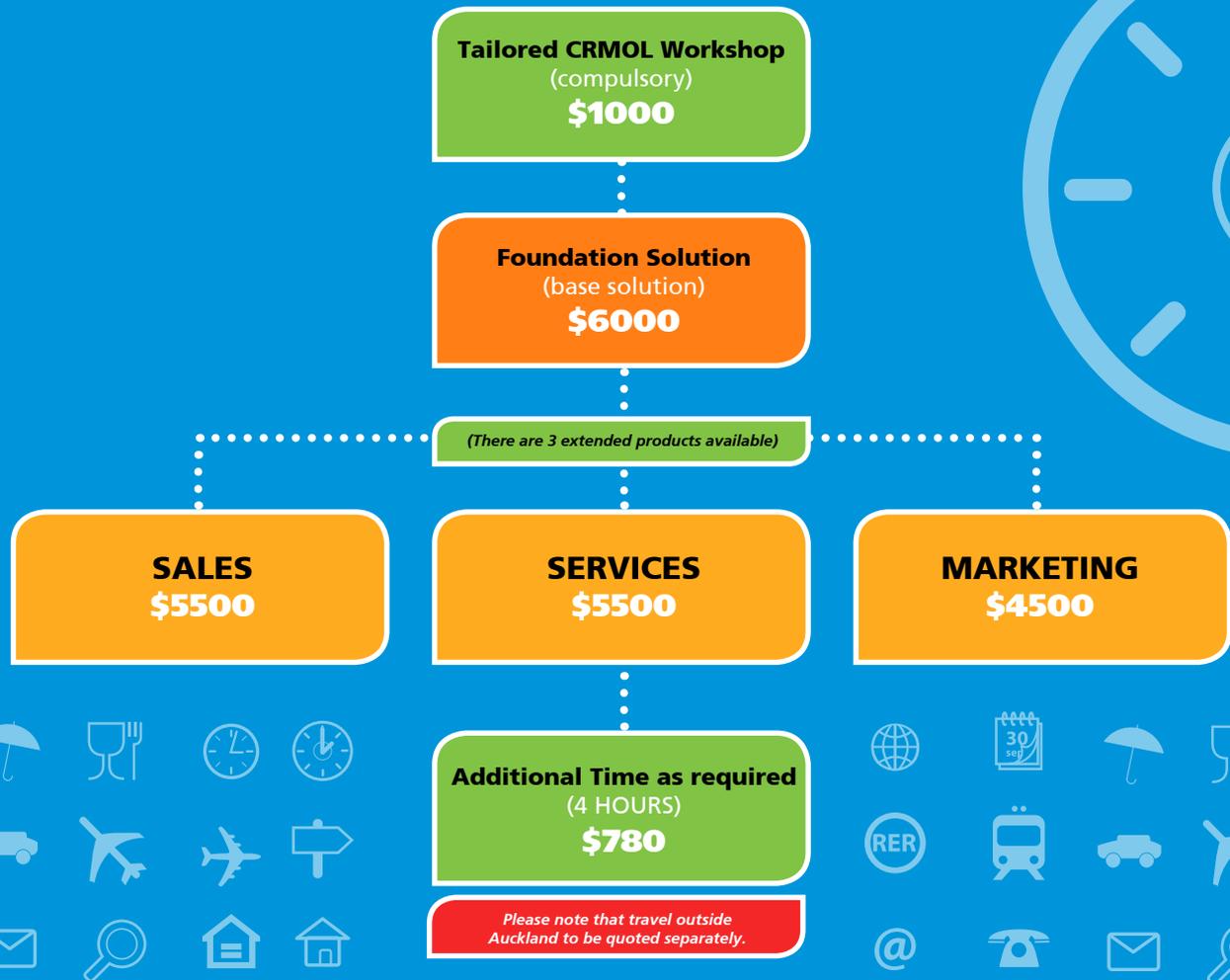
Sellers of products and services are telling us that they need to understand their customers better so they can offer the correct product/service at the right price. This is easier said than done when you do not know where to start, but the solution you need is Customer Relationship Management (CRM). To help you, Dicker Data have partnered with Adaptable Consulting to provide resellers the ability to implement Microsoft Dynamics CRM with a service solution called CRM Smart Start.

Microsoft Dynamics CRM is a market leading software solution that enables organisations to implement a CRM strategy to structure and understand customer engagement over the full customer interaction lifecycle.

The CRM Smart Start process can span from initial discovery, through foundation configuration to specific focus areas such as marketing, sales and/or service management. If further specific consultation is required, this can be purchased in 4 hour blocks. The process is designed to cater for simple CRM deployments with flexibility to roll out and grow into more complex deployments if and when required.

CRM Smart Start can be tailored to your specific requirements and can involve integration of Dynamics CRM with Office365, Outlook, Power BI, SharePoint etc. Dynamics CRM is available anytime, anywhere on any device.

Products & Services available



CRM Smart Start

The process is initiated by purchasing only the services that are required. This will generally start with a tailored workshop. Your customer can complete a simple survey, which will provide Adaptable with enough information to contact you, engage with your customer, set up a CRM trial system and recommend how to configure CRM to meet your customer's needs.

Then based on this discovery of information, Adaptable Consulting will work with your customer on a CRM strategic plan.



CRM Smart Start Foundation

Includes a fully functional customer management system with accounts and contact, associated email, phone call and meeting activity types. Dashboards, views and standard reporting. User set up and security. Importing of existing data via .csv or excel.



Sales

Allowing your salesforce to manage leads through to opportunities. Reporting on overall pipeline monthly, quarterly, annually. Tracking individual or overall company goals/ targets. Competitors management (strengths vs. weaknesses)



Services

Incident / Case management with associated contracts or customers. Distributing cases to teams/ individuals, tracking activities up to completion.



Marketing

Manage marketing lists with campaign and campaign activities. Using sales and/or services records to engage with customers through data segmentation. Tacking all activities to and from customer around events, newsletters, website activities etc.



Additional Hours

Customers can purchase 4-hour blocks of additional time to extend their CRM solution with the following items: training, support, data migration, mobility, customisation and reporting.



HOW DOES CRM Smart Start BENEFIT END CUSTOMERS?

End customers will get a tailored CRMOL solution with their own customer data, with low training effort and because of the familiar interface with Outlook, this will drive maximum user adoption. CRM Smart Start will assist key business decisions driven by availability of data through reports and dashboards which will ensure insights into their customers so that they are able to drive business decisions and collaborate effectively.



HOW DO CRM Smart Start RESELLERS BENEFIT?

- Resellers are the first point of contact for all CRM customers' needs.
- Resellers bill their customers directly.
- Resellers do not need to have in-house CRMOL skills.
- Resellers can upsell service offerings rather than only selling licenses.
- Resellers have an additional product to sell customers even if customer is not making a technology change.
- Resellers can ensure margin on every CRM Smart Start engagement.





YOUR SOLUTION IS CRM Smart Start

Adaptable Consulting is a New Zealand based software company specialising in Microsoft CRM and ERP solutions. Adaptable Consulting enables organisations to implement a CRM strategy to structure and understand customer engagement over the full customer interaction lifecycle. Focusing on salesforce automation, customer services and marketing engagements, (from initial contact via social media or marketing activities, right through the sales channel to the provision of comprehensive support.)

Due to the excellent and adaptable platform from which Microsoft Dynamics CRM provides, Adaptable Consulting market a number of specialist add-on solutions that extend the Dynamics CRM solution to accommodate specific industry or company needs.

