

# CRM Smart Start FAQs

## Background

Dicker Data have partnered with Adaptable Consulting to deliver new revenue streams to Resellers in the form of CRM Smart Start. This allows Resellers the immediate ability to provide these services to a high standard in a way that is profitable, involves minimal investment and is low risk. These services are immediately available.

### Who is Adaptable Consulting?

Adaptable Consulting is a New Zealand based software company specialising in Microsoft CRM and ERP solutions. Some of the work Adaptable Consulting do is business process mapping, project management, product training, implementation services and technical support for Microsoft Dynamics products. Adaptable Consulting also develop and market a number of specialist add-on solutions for Microsoft Dynamics. Adaptable Consulting is a Microsoft Gold Competent Partner with Competencies in the following:

Gold: Dynamics Customer Relationship Management

## General

### What is CRM Smart Start?

Microsoft Dynamics Customer Relationship Management (CRM) is a business strategy that enables customers to understand, focus and prioritise internal activities in order to maximise return on investment.

CRM Smart Start is a best practice framework for setting goals that are specific, measurable, achievable and time-bound. CRM Smart Start is simple, requires very little capital investment and can expand with your business needs. CRM Smart Start can be tailored to your specific business needs and can integrate with Office365, Outlook, Power BI, SharePoint etc. CRM Smart Start is available anytime, anywhere on any device.

### How do Resellers benefit?

Resellers are the first point of contact for all CRM customers' needs

Resellers bill their customers directly

Resellers do not have 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

### Which products can Resellers sell in this program?

There are 3 products available:

Tailored CRMOL Workshop	\$1,000.00
Foundation Solution	\$6,000.00
Sales	\$5,500.00
Services	\$5,500.00
Marketing	\$4,500.00
Additional Time as required – 4 hours	\$780.00

Travel outside Auckland to be quoted separately

Resellers can contact Dicker Data for an indicative quote on these items. Please note that if a customer's requirements change during the time of quoting and the Statement of Work being signed, then any elements considered new will have to re-quoted by Dicker Data. It is the responsibility of Adaptable Consulting to inform Dicker Data of any such changes as soon as possible, so that the Reseller can send these prices to the customer.

### Which End Customer segments can partners sell to?

Resellers can sell to any customers but this solution is mostly targeted to a user base of 5 to 80. Please note that Adaptable Consulting can also work with bigger or smaller customers if needed.

**What End Customers should Resellers target?**

End customers who do not have a CRM solution but need to have a stronger relationship with their customers as well as internal sales collaboration, want to increase their customer satisfaction and drive sales and marketing. End customers who have already purchased one or more of these products: Dynamics CRMOL, Office365, SharePoint and Power BI.

**How much margin can Resellers make?**

10%

**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.

**Who will own the billing relationship to the customer?**

The Reseller will through Dicker Data.

**Is there a demo site available for resellers to view?**

Not at the moment but feel free to watch the video by Tony Armstrong at Dicker Data ModernBiz website.

## Quoting and Ordering

**How can I get a quote?**

Resellers can contact Dicker Data for a quote for CRM Smart Strat. This can be done via CRT Team, BDM's etc as well as sending a quote request through to [sales@dickerdata.co.nz](mailto:sales@dickerdata.co.nz).

**How do I place an order for CRM Smart Start with Dicker Data?**

Resellers need to send through a Purchase Order to Dicker Data as they currently do.

**When will Resellers be invoiced?**

Resellers will be invoiced in the following month of the Purchase Order being received.

**How can a Reseller check the progress of the project?**

Resellers can contact Dicker Data for an update on the project/work in progress. Adaptable Consulting will deliver status updates after the following milestones:

Tailored Workshop

Requirements document

User Acceptance Testing

Go Live

**What are the payment terms?**

Resellers will still have to adhere to the same payment terms as they currently have with Dicker Data which is normally the 20<sup>th</sup> of the next month.

**What if the project is not completed by the time the payment is due?**

Every effort will be made by Adaptable Consulting to complete as much of the work as soon as the Purchase Order has been received. Although this is a service provided it needs to be noted that when you purchase CRM Smart Start, it will work in the same way as when you purchase a license.

**Can I cancel my order once this has been placed?**

No

## **Billing**

### **What happens if end customers don't pay Resellers?**

It is expected that Resellers have standard Terms and Conditions in place with end-customers to protect their business.

### **When will I be invoiced and when will my invoices be due?**

Due dates will be as per your normal payment terms with Dicker Data.

## **Support**

### **Can a Reseller/End customer contact Dicker Data for support?**

End customers should always contact their Reseller FIRST. If there is an issue, Dicker Data will contact Adaptable Consulting to assist with any support issues. There might be a charge associated with support calls.

### **What is the Service Level Agreement (SLA) on CRM Smart Start after a Purchase Order has been received by Dicker Data?**

Please see CRM Smart Start Process Flowchart as below.

### **What is the Service Level Agreement (SLA) on project update?**

24 hours from receipt of the request