



thecrmbusiness

Connecting you with your customers

Powering productivity in professional services



Microsoft Partner

Silver Customer Relationship Management
Gold Customer Relationship Management

Telephone: 0870 766 9875 www.thecrmbusiness.com

Microsoft® Dynamics CRM Online brings a host of exciting new features to Microsoft's Outlook-based Customer Relationship Management software.

Building upon the success of CRM 4.0, Microsoft's latest cloud-hosted CRM offering delivers new functionality including enhanced Outlook client with intelligent data visualisation reporting.

The competitively priced Online Services solutions are hosted in Microsoft's world class datacentres, allowing organisations of all sizes to access the technology as a subscription service without the traditional infrastructure investment. This helps to drive business growth while reducing operational costs and improving efficiency.

CRM Online works seamlessly with Microsoft Office Outlook, so it's easy to handle sales, marketing

and customer service tasks, all within one familiar application, and to integrate with systems including e-commerce, accounting and billing. Out-of-the box data visualisation and dashboards help to provide competitive advantage by providing a 360-degree view of the organisation, its environment and its customers.

Integrating records and sharing insights enhances customer experience and highlights service development opportunities. Understanding customer behaviour, communicating proactively and providing a 'joined up' experience helps to improve retention and lifetime customer value.

Driving productivity and efficiency in professional services

Microsoft Dynamics CRM Online provides powerful, integrated solutions which help professional services firms and consultants to do more with less and increase billable time:

Productivity

Office-Fluent UI: Facilitate easy and natural productivity with a streamlined, familiar user interface and native Microsoft® Outlook® experience, as well as key Office features such as mail merge and Microsoft Excel® export/import.

Advanced Personalisation: Empower people to maximise their own productivity with personal views, most recently used lists, and record pinning.

Streamlined User Experience: Use role-based forms with drag-and-drop customisation and out-of-the-box templates to optimise the user experience.

Resource utilisation

Contextual Document Libraries: Provide instant access to contextual documents associated with any data record or business entity.

Tailored Reporting: Customise your reports to meet your specific needs with flexible, easy-to-use tools for creating and sharing information.

Team Management: Make collaboration easier through team-based record ownership and real-time communication tools.

Solution Management: Easily import, export, and manage applications that make Microsoft Dynamics CRM even more relevant, valuable, and easy to use.

Efficiency and value

Pervasive Auditing: Track business progress and identify opportunities to improve performance with system-wide activity auditing.

Workflow: Automate business processes with workflow, including a visual design environment, full programmatic access to workflow, and sophisticated triggers.

Real-Time Dashboards: Gain deeper insight with real-time dashboards, ad-hoc analysis, and drill-down capability.

Project and Process Management: Track chargeable time, cost projects accurately and provide transparent client billing.

Making CRM right for professional services firms

CRM 2011 is a very customisable system that we can adapt to meet your specific requirements. The CRM Business has a great deal of experience with deploying CRM for professional services firms, and can also provide a template solution that includes:

- CRM Time Tracker solution for more accurate service and resource management
- Advanced project & resource management capability – track activities and expenditures against each individual project
- Event planning functionality
- Membership / subscription management and process automation add-on solution
- Accountancy practice management add-on solution – automate key business processes, reduce administration time and standardise service
- Expenses management
- Holiday / Leave management

Become a Dynamic Business

Your People: Boost Staff Productivity

Give your people familiar, intuitive tools that help them be more productive. With seamless integration to Microsoft® Office, role-based forms, and contextual data visualisations, Microsoft Dynamics CRM can help your people work more efficiently with clients, partners, colleagues and suppliers. Seamless Sharepoint integration enables simple document sharing and collaboration, supporting a collective view of business information.

Your Processes: Streamline Your Business

Automate business processes and streamline operations. With flexible workflows, guided processes, and conditional rules, Microsoft Dynamics CRM helps you better leverage relationships and assets across your organisation and drive more consistent business execution.

Your Ecosystem: Uncover New Opportunities

Extend Microsoft Dynamics CRM beyond traditional customer relationship management and discover new business opportunities. By providing a robust relationship management framework, a flexible data model, and drag-and-drop customisation, Microsoft Dynamics CRM allows you to capitalise on diverse business relationships such as clients, consultants, contractors, suppliers, and more.



thecrmbusiness

Connecting you with your customers

About The CRM Business

The CRM Business is a Microsoft Gold-Certified partner with over seven years' experience working exclusively with Microsoft's CRM products. From our offices in Sheffield and Manchester, we work with customers across the UK, from small businesses to large enterprises, delivering both online (hosted) and on-premise Dynamics CRM solutions. Our dedicated team of Microsoft-certified consultants provides tailored training, remote assistance technologies and break-fix support.

Free 30-day trial of Microsoft Dynamics CRM Online

We are delighted to offer a 30-day free trial, including a remote product demonstration and technical support. With individual logins for up to 20 users you can evaluate the system in your own time and truly understand how it could benefit your business. To sign up, call us on **0870 766 9875** or visit **www.thecrmbusiness.com**

“We use CRM for planning and scheduling training as well as for managing our sales process. When The CRM Business upgraded our system they took the time to fully understand our requirements and customised it to exactly meet our needs, including creating extensive custom reports. All of The CRM Business consultants, developers and support staff demonstrate impressive knowledge and are a pleasure to work with.”

Peter Hitchen, Instep UK

The CRM Business

Sheffield office: The CRM Business,
Electric Works, Sheffield Digital Campus,
Sheffield S1 2BJ

Telephone: 0870 766 9875

Email: enquiries@thecrmbusiness.com

Manchester office: The CRM Business,
Manchester Business Park, 3000 Aviator Way,
Manchester M22 5T

www.thecrmbusiness.com



Microsoft Partner

Silver Customer Relationship Management
Gold Customer Relationship Management