



A simple, visually pleasing, and cost-effective solution that makes it easy to ensure your company is tracking your leads, opportunities, and sales pipeline.

Dynamics 365 is Microsoft's fully featured enterprise-grade CRM (Customer Relationship Management) platform. It does everything any other CRM can do and more, so it can also be costly to customise to each organisation's specific requirements.

We have built a CRM system that better suits our own needs as a small business, and having delivered very similar configurations to multiple customers, realised that lots of other small to medium businesses also need a simplified interface with built-in workflows to automate their sales processes.

In this CRM Starter Kit, we have developed a CRM tool that's quick to install and configure, and simple to use, to help you manage your customer relationships and sales pipeline.

365 Solutions Group have developed custom applications within Microsoft 365 for years and have packaged up a few of our favourites for quick bundle applications added to your existing IT systems for a fraction of the cost of developing them. Each bundle has different limitations, client expectations and system requirements.

CRM Starter Kit

System Benefits

- Get CRM up and running within a few days for minimal cost.
- Single source of truth for all company contacts
- Connected entities, i.e., Accounts List and Contacts List
- Lead and Opportunity tracking
- Customisable conversion process
- Real time report lists, easily customisable per user
- Automatic Email tracking from Outlook to relevant records
- Configurable dashboard, charts, and graphs to manage activity.
- Easily integrates with Power BI for rich analysis and dashboards.
- Daily reminders of due 'next steps'
- Calculated net revenue field

Bundle Inclusions

- The complete installed template
- Team member access with Power Apps licenses
- Managed Leads entity
- Managed Opportunities entity
- Accounts and Contacts
- Simplified navigation
- Microsoft 365 integrations
- Security roles and permissions
- Auto-populated contact fields when lead contact is chosen.
- Email connections
- Outlook add-in
- Phone app
- Customisable process flow
- Personalised 'next steps' and 'next step date' fields
- Daily reminder email for next step summaries
- 365 Solutions Group dashboards
- Up to 4 hours training & tweaks
- Admin and user guides

Included Entities

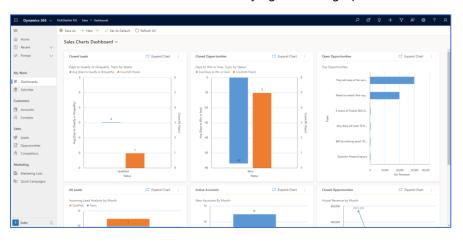
- Contacts is the full list of all individuals you contact
- Accounts are companies which can be partners, prospects or clients that the individuals work for
- Leads are conversations you need to have with prospects to identify how you can help them
- Opportunities are qualified leads that have a defined scope, value and estimated close date
- Competitors is an optional entity which allows you to identify which competitor won the work if you lose an opportunity.

Dashboards

The Activity Dashboard landing page shows a quick snapshot of your scheduled activities across all Leads, Opportunities and Contacts, as well as a summary view of all company's Leads and Opportunities (depending on the permissions you are assigned. Each user sees the content relevant and appropriate to them, and within a sales team, managers can view all activity for those reporting to them. You can set reminders to follow up with contacts as appropriate, monitor the sales stages of each lead and opportunity you manage, assign the probability of closing the sale etc.

III Dynamics 365 🗸 Kic	ASIanter Kit Sales > Daubboards						0	
= 6	$ ightarrow$ Save As $+$ New \sim \checkmark Set As Default \bigcirc Refeech All						_	
⊇ Home D Recent ✓	Activity Dashboard \sim							
🕆 Pinned 🗸 🗸	My Activities v 🖸 Task 🕫 Email 🕴 Open Leads v			+ >	iew (D Refre	ih i	
Ay Work	Statisty Type ∨ Subjet ∨ Name ∨ Name ∨ Name ∨	V Parent Cor	n. v		earch thi	is view int Step \lor	, Net	
E Dashboards	Task Evaluation Plan agreed upon (sample) Normal 8/31/2020 10:00 New store opened this year - follow up (sample			someone	10e -			
Activities	Phone Call Likes some of our new products (sample) High 8/31/2020 12:00 Mailed an interest card back (sample)		_	someone	128m -			
ustomers	Phone Call availability of Product catalogs (sample) High 9/2/2020 10:00 New store opened this year - follow up (sample			someone				
Accounts	Phone Call Very likely will order from us (sample) High 9/3/2020 200 PM Interested in online only store (sample)		_	someone	490 -			
Contacts	Task Pain admitted by sponsor (sample) Normal 9/3/2020 10:00 Good prospect (sample)			someone				
des	Phone Call quidelines for the warranty process (cample) High 9/4/2020 1000 Interested in our newer offerings (sample)			someone				
Leads	Task Evaluation plan underway (sample) Normal 9/4/2020 10:00 Some interest in our products (sample)			someon	1700 -			
Opportunities	Task Sponsor has a buying vision (sample) High 9/4/2020 2:00 PM Likes our products (sample)			someone				
Competitors	Phone Call Discuss new opportunity (sample) High 9/5/2020 10:00 Store is expanding - send new iterature (sample			someone	d10@x -			
arketing								
Marketing Lists Quick Campaigns	4 4 ABC 1-9 of 19 β subsetsel № 6: Page 1 → ABC 1-9 of 10 β subsetsel		_		ĸ	← Pap	±1 →	
	Open Opportunities 🗸 + Nev 🔒 Delete 🗸 1							
	Search this view							
	✔ Topic ∨ Tomal Addr ∨ Next Ste † √							
	Dynamics Product Inquery Ozland Group Solution jamas.carille@r 9/3/2020 Arrange a							
Sales O	Cardina (Bardina 2011) 1000 (cardina) Phylician (cardina)							

The **Dashboards** show simplified graphical insights into your CRM data. They easily are configurable and can be personalized so you can quickly and accurately determine the overall performance against targets, set benchmarks, and drill down to the underlying data the graphics refer to.



Dynamics 365 **integrates** seamlessly with Outlook and saves emails in the relevant record stack and storing quotes and documents to SharePoint.

						_				
3655G Opportunity Sale K New (20	Hrs)	Cal. Revenue	F	Vropose	Close	> <	- 🗣 Save As	+ New \smallsetminus	🖉 Edit 📋 Delete	✓ Set As Default
Summary Files Related				-			Sales Analy	문 Dynamics 3	365 Dashboard	
Document Associated Grid ~ Documents on Demo Integrati				+ New ∨ ↑ Upload	Document Location			வி Power BI D		
Name >> Blank exmaple document.docx	Modified ~ 20/01/2021 8:21 AM	Modified by \checkmark Kim Brian	Location ~ Documents on Demo Inte	Path ↑ ∨ . 365 support_D71B1D34B63	All Locations StatePoint		Won Revenue		Won Revenue	_
new-microsoft365-logo-horiz-c-gray-rgb.jpg	20/01/2021 8:24 AM	Kim Brian	Documents on Demo Inte.	. 365 support_D71B1D34863	5484 SharePoint		THIS QUARTER +	REFRESHED: 1	THIS TEAR	_

• Process Flows

When you add a new **Lead** into our Dynamics 365 system, you can add all the relevant information about the lead in the fields provided. The key fields are in the centre of the page, as the "Next step" and "Next Step Date", which is one of the useful customisations we have made that simplify the system for small businesses. You'll see the visual sales process along the top represented by dots and a progress bar. In most small businesses, the first step after recording the lead is to **Qualify** it as an opportunity once it is defined.

E Dynamics 365 Kick	Starter Kit				ନ ଓ ଦ + ସ ନି 🕲 ? 📧
=	← 🖬 Save 🛱 Save & Close + New 🛛	Flow 🗸			
 ᢙ Home ③ Recent ∨ 	New Lead Lead - Lead -				Lead Source Probability Status Assigned to
	KickStarter Lead to Opp Active for less than one mi	Qualify (< 1 Min)	A Cal. Revenue	A Propose	A Close >
My Work	Summary Details Files	Active for less than one minute	×		
Dashboards Activities	Contact	Topic •			Assistant
Customers	Topic *	Existing Account?			This record hasn't been created yet. To enable this content
Accounts	Existing Account?	Existing Contact?	e		This record must clocel created year to enable and content
A Contacts	Existing contact?	Introduced By			
Sales	First Name *	Estimated Budget Description			
& Leads	Last Name *				
Opportunities Competitors	Job Title				
	Business Phone		F		
Marketing B Marketing Lists	Mobile Phone		Almost there		
🕲 Quick Campaigns	Email		Select Save to see your timeline.		
🖘 Campaigns	Introduced By				
	Lead Source				
	Probability				
S Sales 🗘 🗄	2 Open				

When the **Lead** is qualified, it becomes an **Opportunity**, meaning you now know the value and timeframes of the opportunity. You can follow the steps along the top to complete your sales process flow. These steps can be customised to your specific sales process, and 4 hours of training and customisation are included as part of our Starter Kit package so that the process flow matches your business requirements exactly.

E Dynamics 365 Kid	kStarter Kit					ନ ଓ ଦ + ଟ <i>ହ</i> © ? (୪୫
=	← 🗄 🖬 Save 💕 S	Save & Close 🕂 New 🖒 Refresh 📾 Export t	to PDF 🛱 Close as Won 🔇	Close as Lost 🛛 🗄 Recalculate Opportunity	워, Assign 🛛 Email a Link	🗓 Delete 🗄 Process \vee 🖻 Share 🛧 Follow 🗄
ᢙ Home③ Recent ∨	6 orders of Product Opportunity · Opportunity				0	12/5/2020 \$2,400 90 In Progress Est. Close Date Net Revenue Probability Status V
🖈 Pinned 🗸 🗸	KickStarter Opportunity Active for 76 days	< Qualify	с	al. Revenue	Propose (76 D)	Close
My Work	Summary Files Relate	ed				
語 Dashboards図 Activities	Торіс	* 6 orders of Product SKU JJ202 (sample)	What's Next	Ask them for PO and signed proposal	•	Assistant
Customers	Contact	A Maria Campbell (sample)	Next Step	Ask them for PO and signed proposal	C	Insights
Accounts	Account	Fabrikam, Inc. (sample)	Next Step Date	1/20/2021		🔅 1 suggested follow-up 🔨
A Contacts	Introduced By		Assigned to	• A Kim Brian X	٩	Email requesting a meeting Re:Maria Campbell
Sales	Purchase Timeframe	Immediate				 Re:Maria Campbell
Cleads	Currency	* 💩 AUD	Estimate Revenue	47.000		STAKEHOLDERS :
凡 Competitors	Budget Amount	\$30,000		\$5,000		Maria Campbell (sample)
Marketing	Probability	90	Cost of Sale	\$2,000		Stakeholder
Marketing Lists	Est. Close Date	12/5/2020	Commission	\$600		
R Quick Campaigns	Description	They are after 6 more of their usual order. I've				SALES TEAM
🖘 Campaigns		sent the proposal on Jan 18th	Timeline © Search timeline		+ ⊽ ī≣ :	William Wang : Sales Professional
			Enter a note		0	
			KB 🐺 Note modi	fied by Kim Brian		COMPETITORS

Ongoing Costs

Are there ongoing costs?

 Yes, Dynamics 365 subscriptions are purchased on top of your normal Microsoft 365 licenses.
 We have built the Kickstarter on Dynamics 365 Enterprise, which is \$130.40/u/m

https://dynamics.microsoft.com/ en-au/pricing/

Do I have to buy a full license for everyone?

 No, 365 Solutions Group have built our Kickstarter app so that your Team members can still enjoy the full functionality of Dynamics 365, with a Power Apps per user license for only \$13.70/u/m. If you have at least 1 or 2 full user administrators.

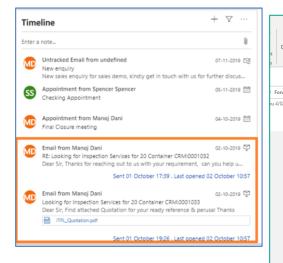
So how much do I pay?

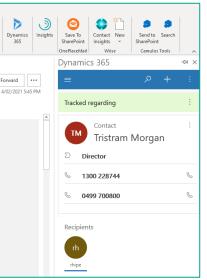
- For example, you have 10 staff who need access, you'll need at least 1 admin user, we recommend 2 admins.
 2 x \$130.30 +
 - 8 x \$13.70 = \$370.40 / month ongoing (10 users on Salesforce would be \$2,100/month)

Comprehensive features

Dynamics 365 for Sales is full of efficiency tools, and 365 Solutions Group's Starter Kit bundle has provided even more. Below are just some of the ways this system makes managing your sales pipeline easier.

The clean integration with the rest of Microsoft provides automatic email integration through Outlook Add-Ins, and automatic email tracking to contact and opportunity timelines. It's smart enough to auto-assign emails, but secure enough to only show emails to the person whose account they come from, until the user confirms that they should be tracked in Dynamics, so they appear for everyone.





Microsoft's Artificial Intelligence (AI) assistant provides suggested activities for opportunities and leads, as well as showing valuable insights to help close the sale.

Our bundle also includes:

- Integration with Bing Maps
- Automatically generated task/ appointments from meetings
- Calculated net revenue
- Daily 'next step' summaries
- Basic Marketing functionality

顾	Next meeting in 10 minutes Proposal Review	
	Maria Campbell mentioned "Why product delive delayed again" in her recent email today.	ery
Ø	Opportunity Name Fourth Coffee	
C	6 Atter 1 Per	
Create	Case Open Email	
Create	Case Open Email Issue Detected Product delivery delayed	
Create	Issue Detected	
2a	Issue Detected Product delivery delayed Maria Campbell mentioned "Why product delive delayed again" in her email.	
æ	Issue Detected Product delivery delayed Maria Campbell mentioned "Why product delive	



• How does it compare?

Dynamics 365 is a very versatile and modular application for small businesses and large enterprise. It often competes with 2 popular products in the market, Salesforce for Sales and HubSpot for marketing. In the below table, we compare some of the key features across these products.

	Dynamics 365	salesforce	HubSpot
Enterprise Subscription	\$130.40/u/m	\$210/u/m	\$173/u/m
Approx. setup costs	\$4,950 for our kickstarter	\$5,000-\$80,000 (<u>link</u>)	\$25,000 (<u>link</u>)
Worldwide users as Jul 2020	Over 4 million	150,000	78,700
Tracks Leads and Opportunities	\bigcirc	\odot	\bigcirc
Real time reports and graphic dashboard	\bigcirc	\bigcirc	0
Custom entities, workflows, process and forms	\bigcirc	\bigcirc	Ø
Mobile App	\bigcirc	\bigcirc	Ø
Visual sales process tracking across the top of the page	Ø	\bigcirc	8
Add-in to emails	\odot	$\langle \bigcirc \rangle$	\bigcirc
	Outlook add-in & Browser	Browser only	Browser only
Natively integrated with LinkedIn	\bigcirc	Special connector	۲
Tracks emails to timeline	Ø	\bigcirc	\bigcirc
	Out of the box	Special connector	Special connector
Scan business card contacts	and email signature scanner	Special connector	Ø
Al assistant for suggested activities		×	۲
Stores files in SharePoint	Ø	\bigotimes	8
Ready to go out of the box	\bigcirc	\bigcirc	۲
Committed to 99.99%	Needs more customisation	Needs more customisation	Needs less customisation
uptime guarantee	V		
Marketing templates and automation	with full Marketing module	\bigotimes	Ø
Website landing pages	\bigcirc	\otimes	Ø
	with full Marketing module		

• Bundle Pricing

This **complete bundle** costs AUD **\$7,800** plus GST, including Dynamics 365 template installation, configuration of system for your specific sales process, configuration of connections, user permission levels (management vs staff), testing and project management.

The **optional additions** as listed on the right can be included for an additional fee (starting at \$500 depending on the addition). Restrictions and limitations apply. Further changes and associated costs can be discussed upon expression of interest.

Return on Investment (ROI)

- ✓ Using CRM software can **increase sales conversion** rates by up to 300%. (Source: Cloudswave)
- ✓ Businesses that leverage CRM software see sales increase by 29%, sales productivity increase by 34%, and sales forecast accuracy increase by 42%. (Source: Salesforce)
- ✓ A recent survey revealed that for companies that use a CRM, the average return on their technology investment is **\$8.71 for each dollar spent**. (Source: Nucleus Research)
- Why does a CRM produce such a high return on investment (ROI)? Because it streamlines and automates manual processes so your team can spend less time on time-consuming processes like data entry, and instead focus more attention on forming strategy and interacting with customers.
- In other words, your team can spend more time focusing on delivering a stellar customer experience and building brand loyalty. That is difficult to do when an endless list of busy work leaves your team swamped with admin tasks instead of driving sales conversations.

Optional Additions

The following will incur additional costs if required:

- User email notifications of process stages
- 365 Solutions Group dashboards (with Power BI Pro subscription)
- Additional training
- Additional tweaks and customisation
- Custom branding





Contact us today to discuss available options

sales@365sg.com.au | 1300 228 744 www.365solutionsgroup.com.au