



365 Solutions
Group



Microsoft
Dynamics® 365

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

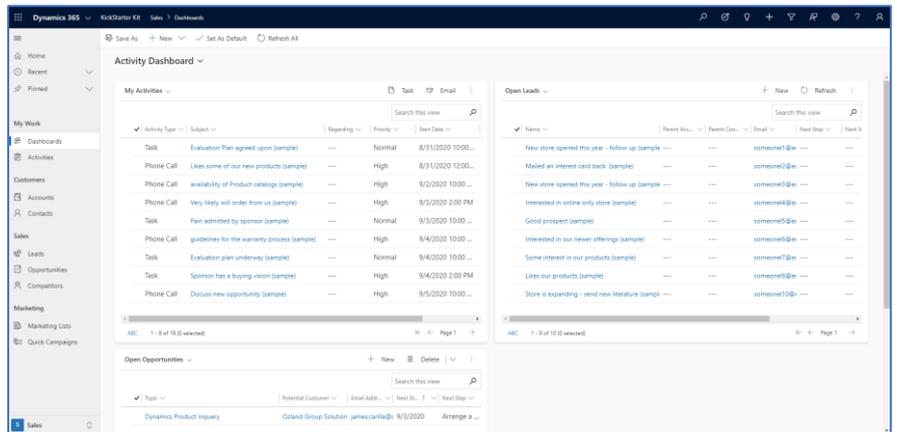
- The complete installed template
- Team member access with Power Apps licenses
- Managed Leads entity
- Managed Opportunities entity
- Accounts and Contacts
- Simplified navigation
- Microsoft 365 integrations
- Security roles and permissions
- Auto-populated contact fields when lead contact is chosen.
- 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

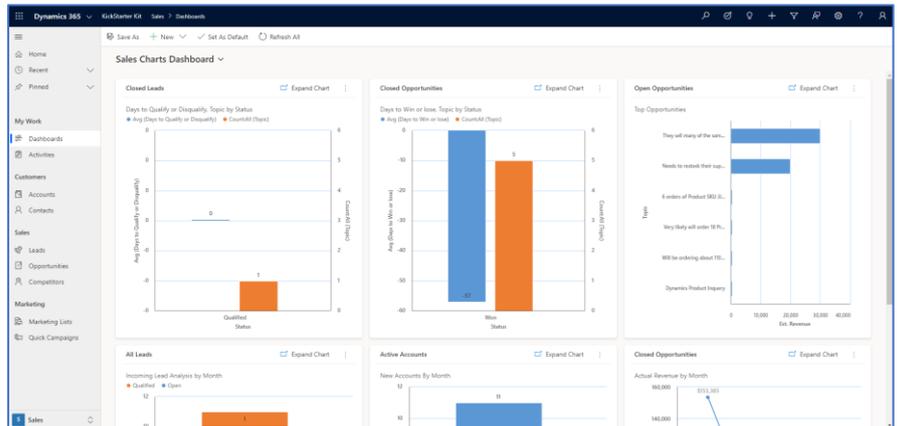
- **Contacts** is the full list of all individuals you contact
- **Accounts** are companies which can be partners, prospects or clients that the individuals work for
- **Leads** are conversations you need to have with prospects to identify how you can help them
- **Opportunities** are qualified leads 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

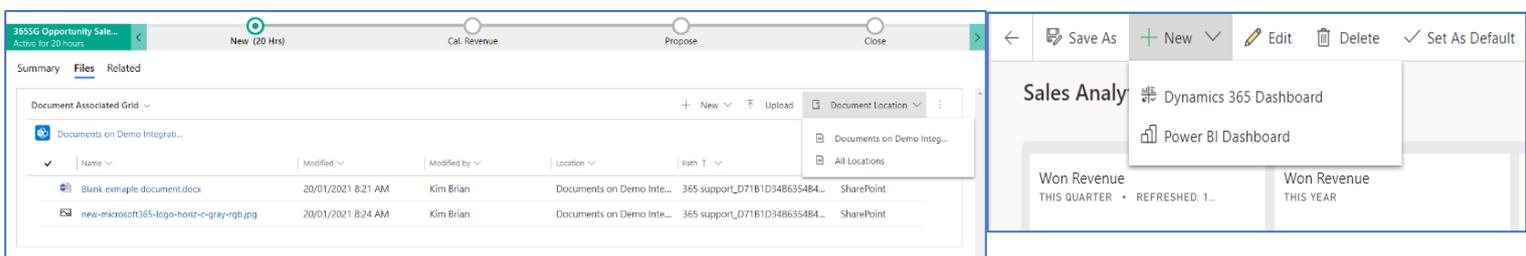
The **Activity Dashboard** landing page shows a quick snapshot of your scheduled activities across all Leads, Opportunities and Contacts, as well as a summary view of all company's Leads and Opportunities (depending on the permissions you are assigned). Each user sees the content relevant and appropriate 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.



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.

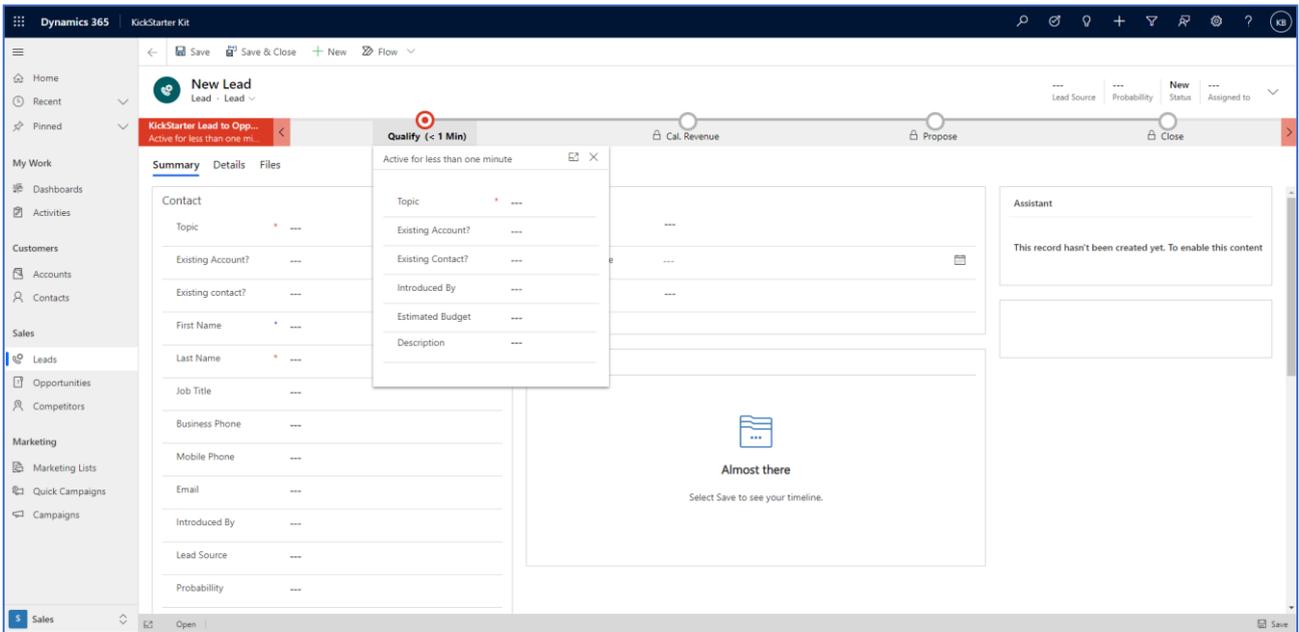


Dynamics 365 **integrates** seamlessly with Outlook and saves emails in the relevant record stack and storing quotes and documents to SharePoint.

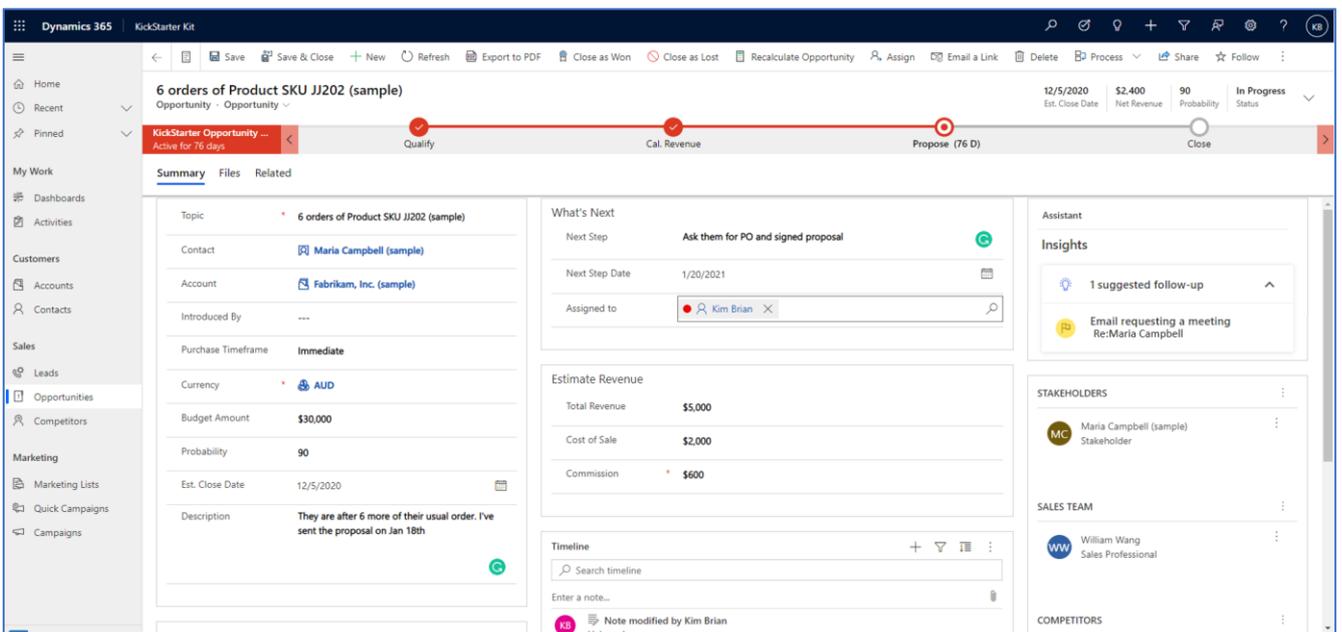


● Process Flows

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.



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.



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?

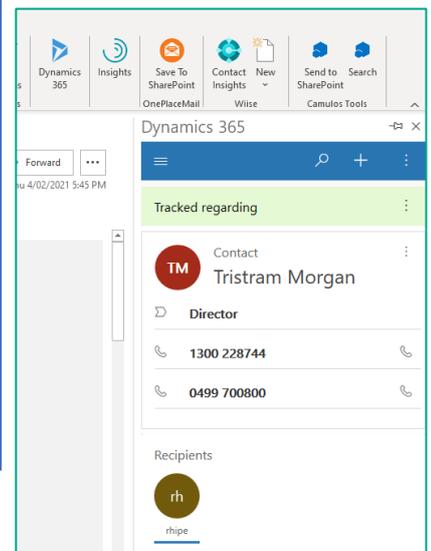
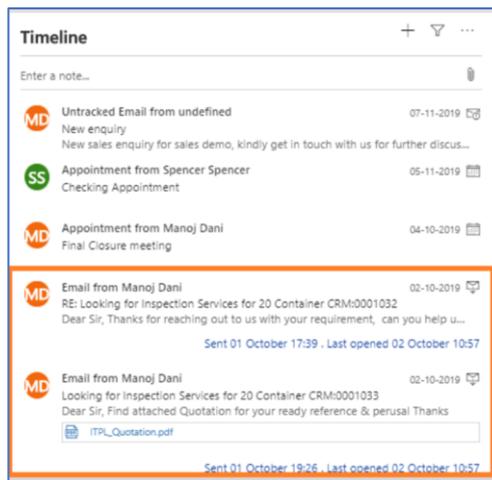
- For example, you have 10 staff who need access, you'll need at least 1 admin user, we recommend 2 admins.
 $2 \times \$130.30 +$
 $8 \times \$13.70 =$
 $\$370.40 / \text{month ongoing}$
(10 users on Salesforce would be \$2,100/month)



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.

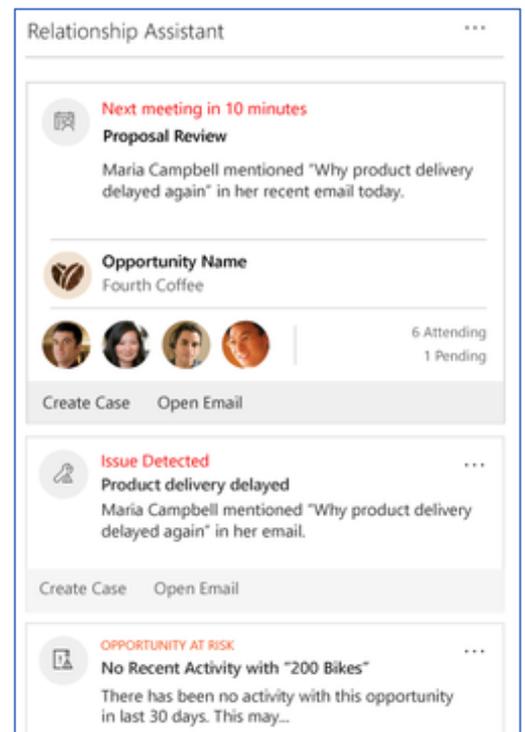
The clean integration with the rest of Microsoft provides automatic email integration through Outlook Add-Ins, and automatic email tracking to contact and opportunity timelines. It's smart enough to auto-assign emails, but secure enough to only show emails to the person whose account they come from,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

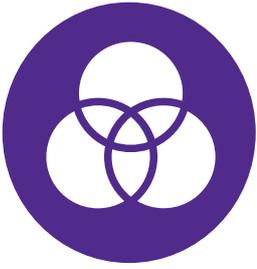


Microsoft's Artificial Intelligence (AI) assistant provides suggested activities for opportunities and leads, as well as showing valuable insights to help close the sale.

Our bundle also includes:

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





- 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 (link)	\$25,000 (link)
Worldwide users as Jul 2020	Over 4 million	150,000	78,700
Tracks Leads and Opportunities			
Real time reports and graphic dashboard			
Custom entities, workflows, process and forms			
Mobile App			
Visual sales process tracking across the top of the page			
Add-in to emails	 Outlook add-in & Browser	 Browser only	 Browser only
Natively integrated with LinkedIn		 Special connector	
Tracks emails to timeline	 Out of the box	 Special connector	 Special connector
Scan business card contacts	 and email signature scanner	 Special connector	
AI assistant for suggested activities			
Stores files in SharePoint			
Ready to go out of the box	 Needs more customisation	 Needs more customisation	 Needs less customisation
Committed to 99.99% uptime guarantee			
Marketing templates and automation	 with full Marketing module		
Website landing pages	 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

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