

Introducing Microsoft Dynamics CRM



Top 10 Benefits of
Microsoft Dynamics CRM



Demonstrating
Microsoft Dynamics CRM



Which Organisations Use
Microsoft Dynamics CRM?



CRM Planning
Resources

10 Benefits of Microsoft Dynamics CRM

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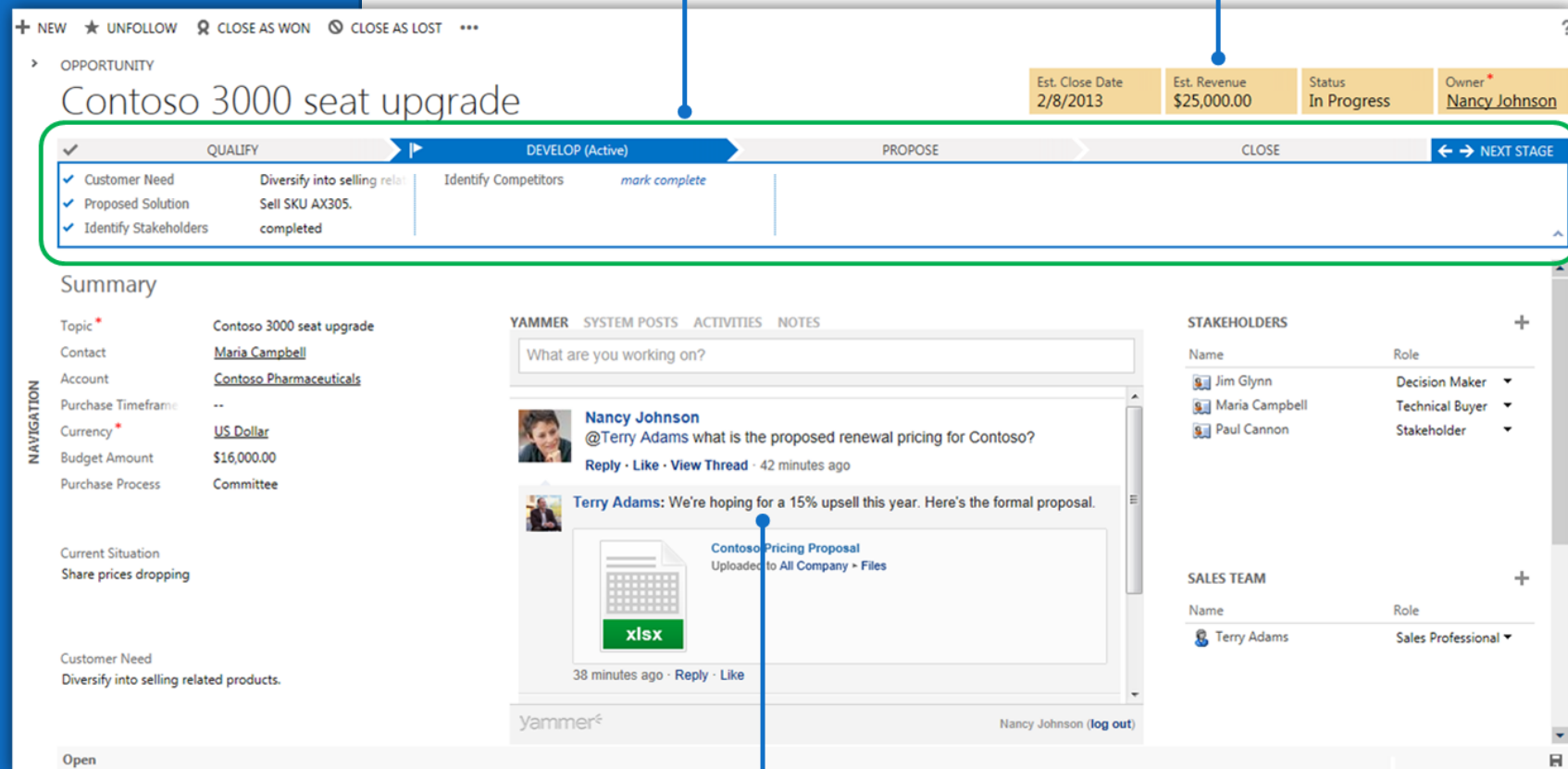
#1

View Everything in 1 Interface

Pre-defined process
best practices

Easy access to
important data

Process Driven
People Centric
Results Oriented

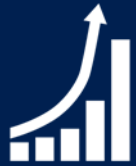


The screenshot displays the Microsoft Dynamics CRM interface for an opportunity. At the top, there are navigation options: '+ NEW', '★ UNFOLLOW', '🔒 CLOSE AS WON', '🔒 CLOSE AS LOST', and '⋮'. Below this, the opportunity name 'Contoso 3000 seat upgrade' is shown. To the right, key data points are displayed: 'Est. Close Date: 2/8/2013', 'Est. Revenue: \$25,000.00', 'Status: In Progress', and 'Owner: Nancy Johnson'. A process flow bar is visible, with stages: 'QUALIFY', 'DEVELOP (Active)', 'PROPOSE', and 'CLOSE'. A 'NEXT STAGE' button is on the right. Below the flow bar, a table shows task progress: 'Customer Need' (Diversify into selling related products, mark complete), 'Proposed Solution' (Sell SKU AX305, completed), and 'Identify Stakeholders' (completed). The 'Summary' section on the left lists details: Topic (Contoso 3000 seat upgrade), Contact (Maria Campbell), Account (Contoso Pharmaceuticals), Purchase Timeframe (--), Currency (US Dollar), Budget Amount (\$16,000.00), Purchase Process (Committee), Current Situation (Share prices dropping), and Customer Need (Diversify into selling related products). The central 'YAMMER' section shows a conversation: Nancy Johnson asks '@Terry Adams what is the proposed renewal pricing for Contoso?', and Terry Adams replies 'We're hoping for a 15% upsell this year. Here's the formal proposal.' with an attached 'Contoso Pricing Proposal' (xlsx) file. The right sidebar shows 'STAKEHOLDERS' (Jim Glynn - Decision Maker, Maria Campbell - Technical Buyer, Paul Cannon - Stakeholder) and 'SALES TEAM' (Terry Adams - Sales Professional). A 'NAVIGATION' pane is on the far left, and an 'Open' button is at the bottom left.

Social collaboration
at the forefront

#2

Connects Teams to a Single Unified Solution



Sales

- Lead Management
- Opportunity Manager
- Pipeline Forecasting
- Sales Automation
- Quote Management
- Sales Goal Tracking



Marketing

- Campaign Management
- Email Marketing
- Lead Scoring
- Event Management
- Marketing ROI Analysis
- Contact Profiling



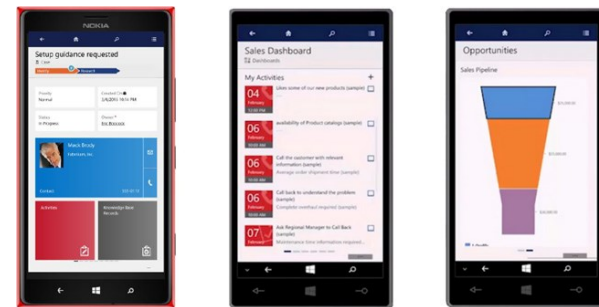
Service

- Case Management
- SLA Support
- Account Management
- Service Automation
- Customer Portals
- Contract Management

#3

Makes Staff More Profitable - wherever they work

- Stay Connected to CRM when away from the office
- Cross Web-Browser Support on multiple devices
- Free Mobile, iPad & Windows 8 Tablet Apps included with every CRM licence

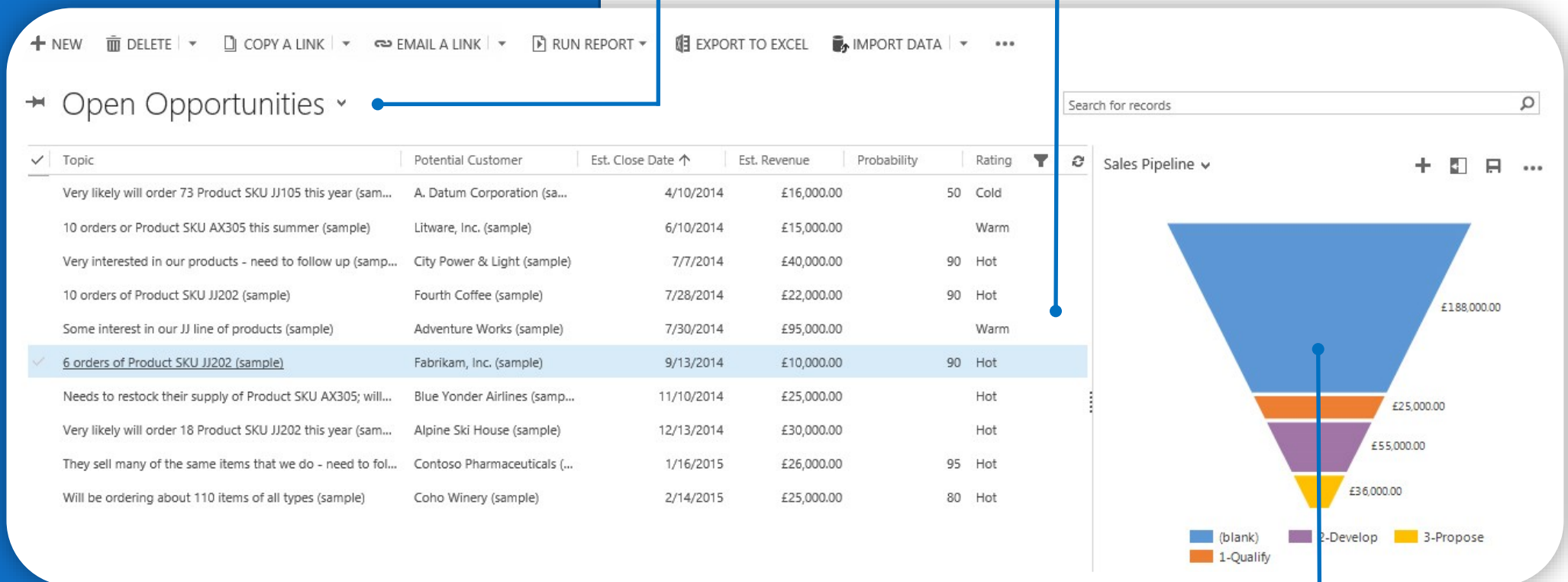


#4

Real-time Insight

Quickly create personalised views that dynamically list all the data you need to work with

Real-time reporting insight across all teams & CRM processes including servicing, sales & marketing



The screenshot displays the Microsoft Dynamics CRM interface. On the left, a table titled "Open Opportunities" lists various potential customers and their estimated revenue. On the right, a "Sales Pipeline" funnel chart shows the distribution of opportunities across different stages: 1-Qualify, 2-Develop, and 3-Propose.

✓	Topic	Potential Customer	Est. Close Date ↑	Est. Revenue	Probability	Rating
	Very likely will order 73 Product SKU JJ105 this year (sam...	A. Datum Corporation (sa...	4/10/2014	£16,000.00	50	Cold
	10 orders or Product SKU AX305 this summer (sample)	Litware, Inc. (sample)	6/10/2014	£15,000.00		Warm
	Very interested in our products - need to follow up (samp...	City Power & Light (sample)	7/7/2014	£40,000.00	90	Hot
	10 orders of Product SKU JJ202 (sample)	Fourth Coffee (sample)	7/28/2014	£22,000.00	90	Hot
	Some interest in our JJ line of products (sample)	Adventure Works (sample)	7/30/2014	£95,000.00		Warm
✓	6 orders of Product SKU JJ202 (sample)	Fabrikam, Inc. (sample)	9/13/2014	£10,000.00	90	Hot
	Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (samp...	11/10/2014	£25,000.00		Hot
	Very likely will order 18 Product SKU JJ202 this year (sam...	Alpine Ski House (sample)	12/13/2014	£30,000.00		Hot
	They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	1/16/2015	£26,000.00	95	Hot
	Will be ordering about 110 items of all types (sample)	Coho Winery (sample)	2/14/2015	£25,000.00	80	Hot

The Sales Pipeline chart shows the following values for each stage:

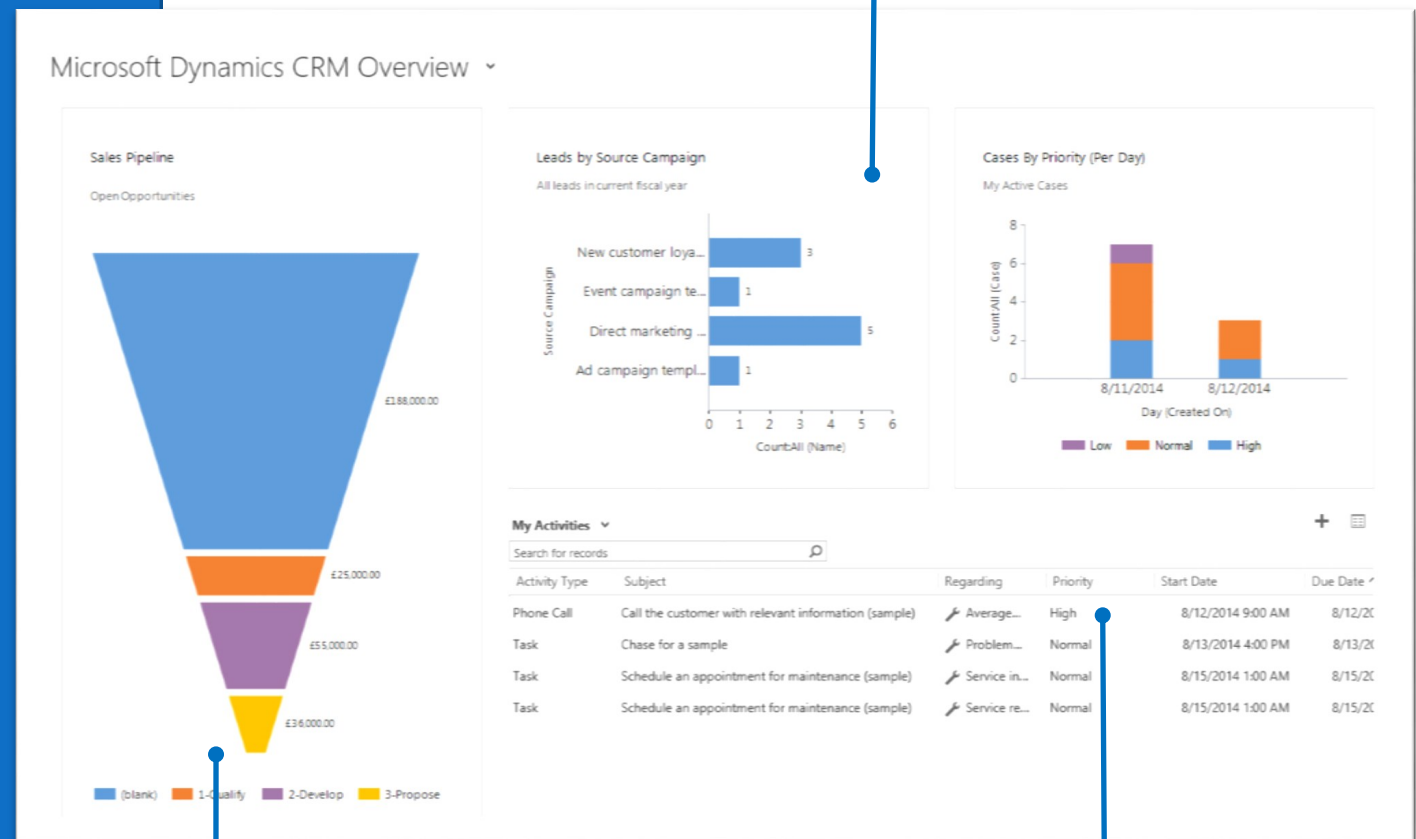
- 1-Qualify: £188,000.00
- 2-Develop: £25,000.00
- 3-Propose: £55,000.00
- Blank: £36,000.00

Easily interpret data using contextual charts & drill down for further analysis

Business Intelligence

Personalise CRM dashboards that monitor individual & team performance in real-time

Real-time actionable insight
Nimble decision-making
Drill-down dashboards



Create individual CRM dashboards, or share team views with other users

Embed list views & charts in user defined CRM dashboards

#5

Improves Process Efficiency



Automates
Routine Tasks

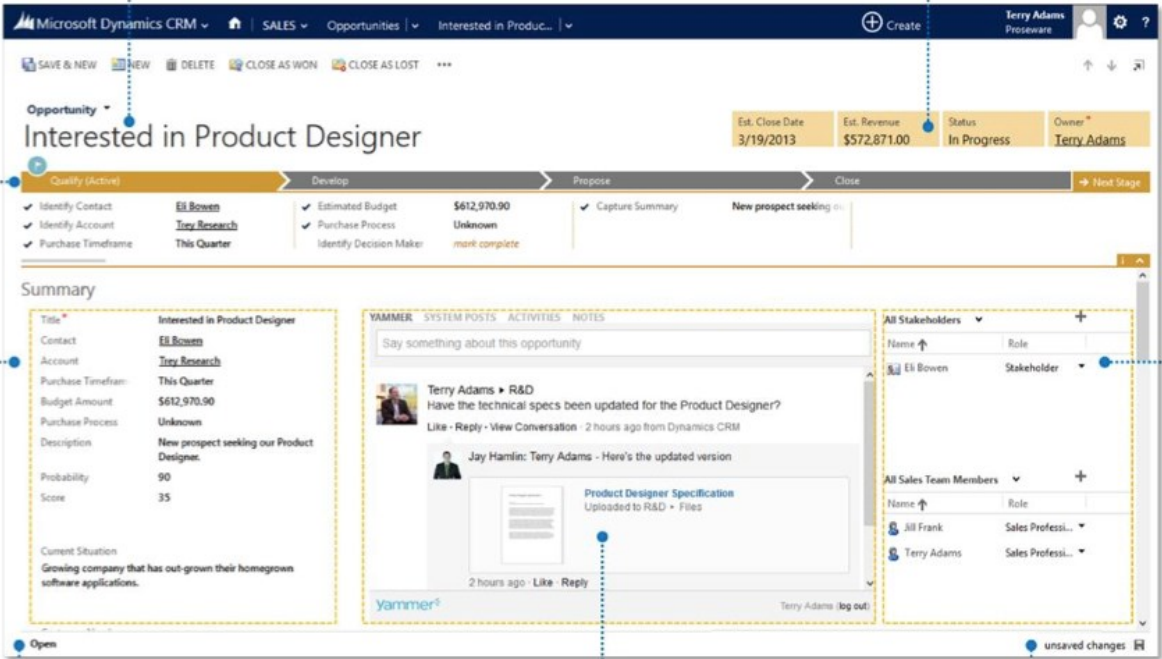


Microsoft
Dynamics CRM

- **Send automated customer emails** when actions occur, e.g. confirmation messages when a new service case is created, updated & closed
- **Trigger automated team emails** when important events happen, e.g. when a new high value opportunity is created, or if case is likely to breach the SLA
- **Integrates with external data sources** to automate the flow of data and create a single customer view in CRM
- **Automated lead scoring & routing** helps marketing teams identify the best campaign leads & automatically promote 'sales ready' prospects
- **Process Control & Stage Gating** guides users, increases data quality and enforces your process rules

Process Guidance & Agility

The CRM user interface helps users navigate processes & understand what action needs to happen next



What is this record about?

Why do I need to pay attention to this record?

Where is this record?

Primary Information

Secondary Information

What is the status of this record?

What has happened and is happening?

Is this record currently saved?

Summary

Title*	Interested in Product Designer
Contact	Eli Bowen
Account	Trey Research
Purchase Timeframe	This Quarter
Budget Amount	\$612,970.90
Purchase Process	Unknown
Description	New prospect seeking our Product Designer.
Probability	90
Score	35

Yammer Activity:

- Terry Adams • R&D: Have the technical specs been updated for the Product Designer? (2 hours ago)
- Jay Hamlin: Terry Adams - Here's the updated version (2 hours ago)

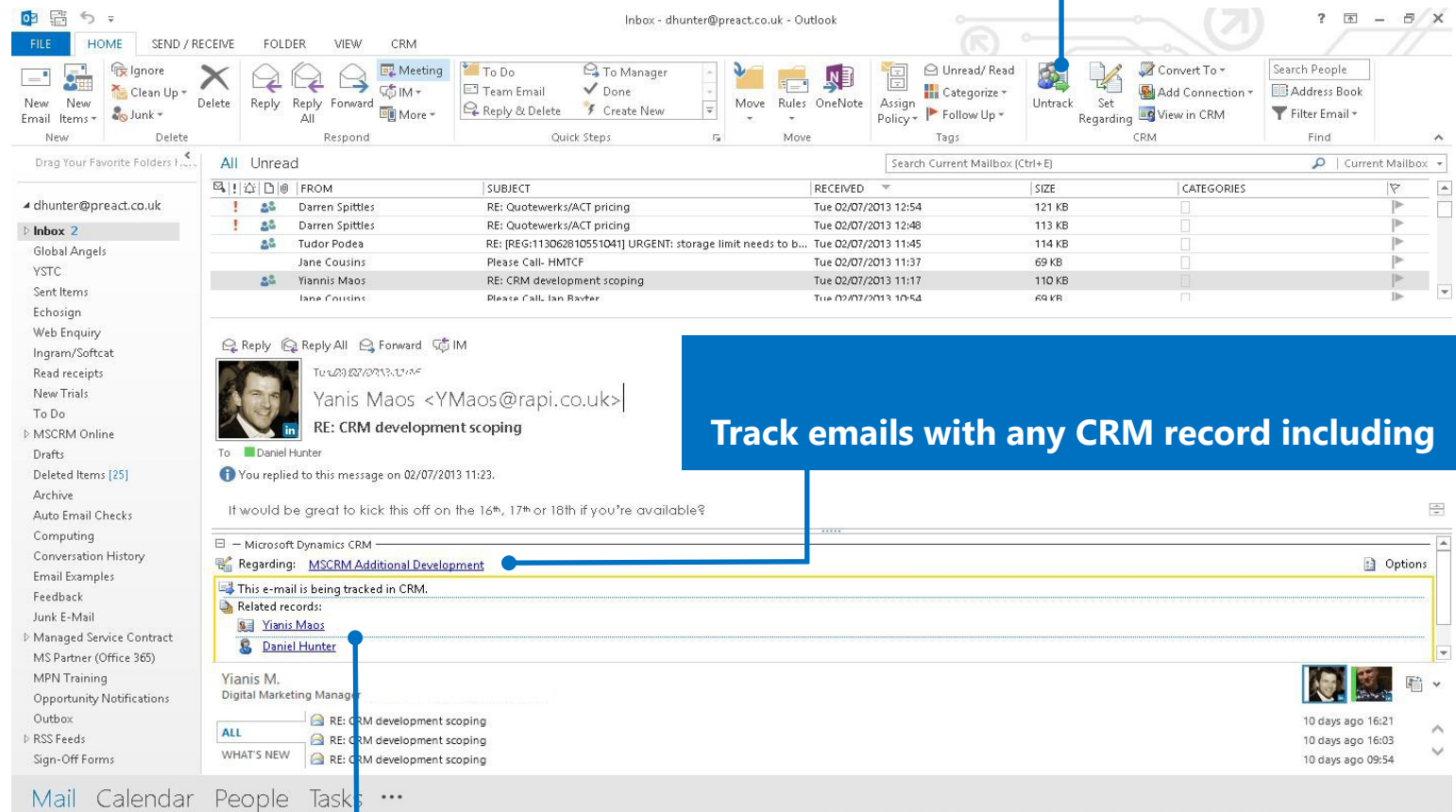
Stakeholders:

Name	Role
Eli Bowen	Stakeholder
Jill Frank	Sales Professional
Terry Adams	Sales Professional

#6

Seamless Outlook Integration

Emails are automatically attached to matching CRM records



The screenshot shows the Outlook interface with the CRM tab active. The email list shows several messages, with the selected one being from Yianis Maos. The detailed view of the email shows it is tracked in CRM, with related records listed below. The CRM records are:

Category	Subject	Date
ALL	RE: CRM development scoping	10 days ago 16:21
WHAT'S NEW	RE: CRM development scoping	10 days ago 16:03
WHAT'S NEW	RE: CRM development scoping	10 days ago 09:54

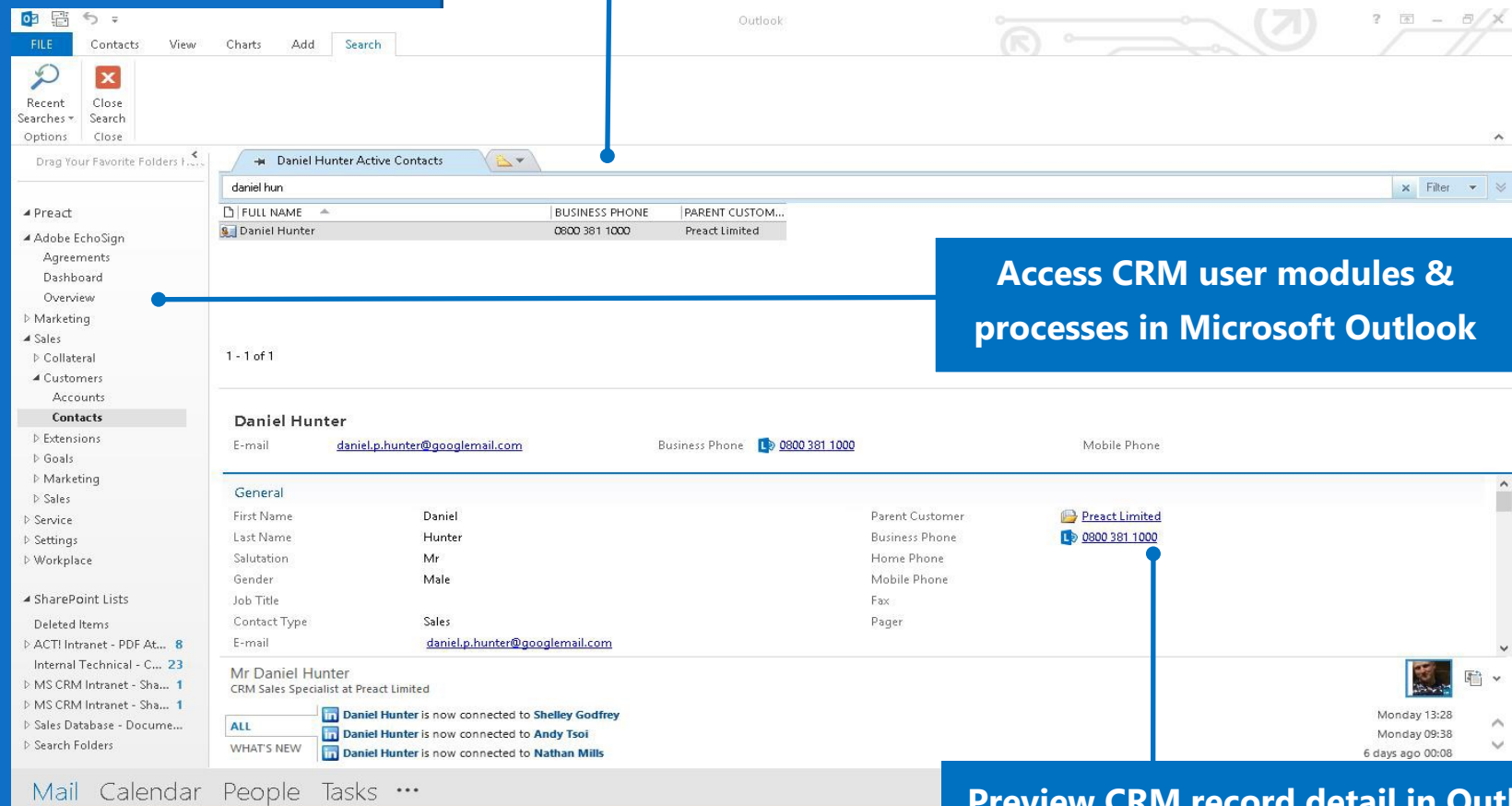
Track emails with any CRM record including

See how each email is tracked in Dynamics CRM and click to open these records



Outlook Integration

Pin frequently viewed CRM lists to the Outlook bar & click to open each CRM record



FILE Contacts View Charts Add Search

Recent Searches Close Search Options Close

Drag Your Favorite Folders Here

Preact

- Adobe EchoSign
- Agreements
- Dashboard
- Overview
- Marketing
- Sales
 - Collateral
 - Customers
 - Accounts
- Contacts
 - Extensions
 - Goals
 - Marketing
 - Sales
 - Service
 - Settings
 - Workplace
- SharePoint Lists
 - Deleted Items
- ACTI Intranet - PDF At... 8
- Internal Technical - C... 23
- MS CRM Intranet - Sha... 1
- MS CRM Intranet - Sha... 1
- Sales Database - Docume...
- Search Folders

Daniel Hunter Active Contacts

Full Name	Business Phone	Parent Custom...
Daniel Hunter	0800 381 1000	Preact Limited

1 - 1 of 1

Daniel Hunter

E-mail daniel.p.hunter@googlemail.com Business Phone [0800 381 1000](tel:08003811000) Mobile Phone

General

First Name	Daniel	Parent Customer	Preact Limited
Last Name	Hunter	Business Phone	0800 381 1000
Salutation	Mr	Home Phone	
Gender	Male	Mobile Phone	
Job Title		Fax	
Contact Type	Sales	Pager	
E-mail	daniel.p.hunter@googlemail.com		

Mr Daniel Hunter
CRM Sales Specialist at Preact Limited

WHAT'S NEW

- [Daniel Hunter](#) is now connected to [Shelley Godfrey](#)
- [Daniel Hunter](#) is now connected to [Andy Tsoi](#)
- [Daniel Hunter](#) is now connected to [Nathan Mills](#)

Monday 13:28
Monday 09:38
6 days ago 00:08

Mail Calendar People Tasks ...

Access CRM user modules & processes in Microsoft Outlook

Preview CRM record detail in Outlook & click to call with Lync or Skype

#7

Adapts to Manage Any Relationship & Process



Asset
Management



Facilities
Management



Fleet
Management



Project
Management



Partner
Management



Human Resources
Management



Event
Management



+ Virtually Any Other
Relationship & Process

#8

Integrates with Multiple Apps & Data Sources



Integrated
Applications

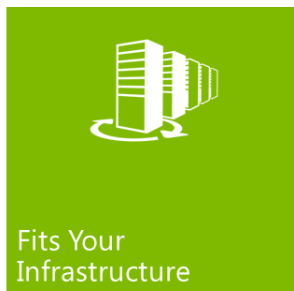


Microsoft
Dynamics CRM

- **with Accounting** - access client order histories & financial details in Dynamics CRM & send completed orders for processing
 - **with Marketing Automation** - integrations include dotMailer & Click Dimensions to personalise emails, automate messages & track recipient actions in Dynamics CRM
 - **with Websites** - import new enquiry forms & create new lead records
 - **with Web Tracking** - identify which companies visit your website & track these clicks in CRM to uncover new prospects & increase online ROI
 - **with Surveys** - match customer satisfaction responses & other survey replies to CRM contact records
 - **with Membership Databases** - synchronising renewal dates & other member detail
- + Dynamics CRM integrates with many more applications & data sources

#9

Choice of Deployment



- CRM in the Cloud for just £40.50+VAT per user each month
- New updates released prior to the on-premise edition
- Including all CRM functions & 5GB data storage
- 99.9% financially backed up-time Service Level Agreement
- Disaster Recovery Service



- Manage Dynamics CRM on your own server & within your firewalls
- Full autonomy to apply CRM releases & updates
- Requires purchase of server licence & Client Access Licences
- Server & CALs include Microsoft software assurance - renewable every 3 years
- No cloud CRM data storage limits

#10

Scalable Database Architecture

- Simple tools to configure CRM forms, views, reports, workflow & security
- Supports Managed Solutions for Controlled Delivery
- Scalable platform, minimal need for custom coding



Security Role: Salesperson Working on solution: Default Solution

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	👉	🟢	🟢	👉	🟢	🟢	👉	🟢
Activity	👉	🟢	👉	👉	👉	👉	👉	🟢
Announcement	🚫	🟢	🚫	🚫				
Application File	🚫	🟢	🚫	🚫				
Connection	👉	🟢	🟢	👉	🟢	🟢	👉	🟢
Connection Role	🚫	🟢	🚫	🚫	🚫	🚫		
Contact	👉	🟢	🟢	👉	🟢	🟢	👉	🟢
Customer Relationship	🚫	🚫	🚫	🚫	🚫	🚫	🚫	🚫
Data Import	👉	👉	👉	👉	👉	👉	👉	🟢
Data Map	👉	🟢	👉	👉	👉	👉	👉	🟢
Document Location	🟢	🟢	🟢	🚫	🟢	🟢	🟢	🟢
Duplicate Detection Rule	🚫	🟢	🚫	🚫	🚫	🚫	🚫	🚫
E-mail Template	👉	🟢	👉	👉	👉	🚫	👉	👉
Follow	👉	🟢		👉	👉			
Import Source File	👉	👉	👉	👉	👉	👉	👉	🟢
Lead	👉	🟢	🟢	👉	🟢	🟢	👉	🟢

Key

- 🚫 None Selected
- 👉 User
- 👉 Business Unit
- 🟢 Parent: Child Business Units
- 🟢 Organization

Which Businesses Use Microsoft Dynamics CRM?

Microsoft Dynamics CRM is used by over 40,000 organisations & more than 4 million users worldwide.

Some of Preact's clients that rely on Dynamics CRM include:

<p>Charity & Public Sector</p> 	<p>Education & Professional Services</p> 	<p>full potential group</p> 	<p>IT & Telecoms</p> 
<p>Financial Services</p> 	<p>Health & Life Sciences</p> 	<p>Other Industries</p> 	<p>MIDSHIRE technology for your office</p> 

Dynamics CRM Success Stories



Ramsac Limited

"Through Dynamics CRM we now have up to date, accurate management information that we've completely personalised to our specific needs, and that's enabling us to make more informed strategic decisions."

[Download the Case Study](#)



Illumine Limited

"Preact is very supportive, they are always on the phone when we need help and have proved adept at finding new solutions which enable us to manage more processes in Microsoft Dynamics CRM."

[Download the Case Study](#)



The Health and Safety People

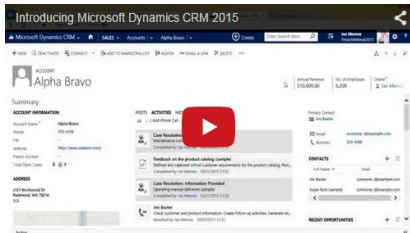
"Microsoft Dynamics CRM has quickly proved an excellent resource to all our users because it facilitates improved efficiency and visibility. Our customer service operation is greatly improved by using CRM."

[Download the Case Study](#)

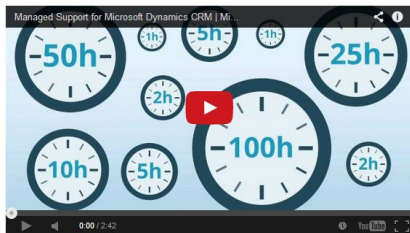
Microsoft Dynamics CRM Presentations



[Discover Microsoft Dynamics CRM with Preact](#) [2:59]
How Preact help businesses get ahead with Dynamics CRM



[Introducing Microsoft Dynamics CRM](#) [41:16]
Demonstrating the processes & benefits of Microsoft Dynamics



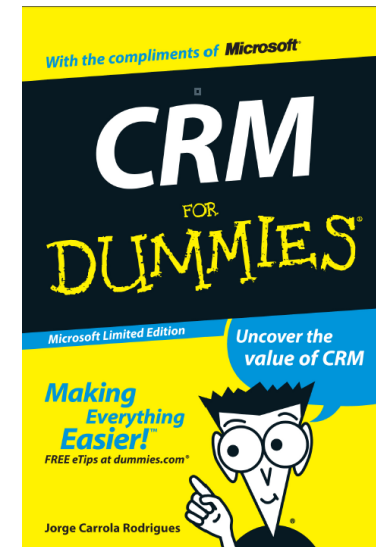
[Preact Managed Support for Dynamics CRM](#) [2:41]
How our all inclusive support package helps businesses maximise the value of Microsoft Dynamics CRM

CRM Planning Resources

[Video] 11 Steps to Plan CRM

Download Infographics

Download CRM Planning eBook



Partnering with Preact

- Proven track record. We been helping businesses gain results from CRM since 1993
- Committed to delivering on our brand promise of Exceeding Customer Expectations - 93% of our clients rated our service 'excellent' (Based on customer feedback collected July 2013 - June 2014)
- We hold Microsoft's highest accreditations for CRM & Cloud Solutions
- 100% CRM focus. Our services include: requirements scoping, data migration, bespoke development, CRM integration, user training & support
- Flexible CRM implementations. We offer fully considered scope-led as well as fixed cost quick-start options
- We actively supporting over 4000 CRM users

Preact provide excellent advice for our changing needs with a wide range of support, both technical and training.

Gordon Pearson, Mencap

Without Preact we never would have got started and their detailed training has proved crucial in keeping us on track

Mark Buist, Penguins Events

Preact has consistently delivered a high level of customer care and their CRM knowledge is second to none.

Dan May, Ramsac

Contact us today to find out more

www.preact.co.uk | tel: 0800 381 1000 | sales@preact.co.uk