PowerStart for Sales CRM

When people talk about CRM, they are usually referring to CRM software, a tool that is used for contact management, sales management, productivity, and more.

CRM software digitises processes and automates tasks to improve the efficiency and effectiveness of customer relationship management.

An effective CRM system is used to manage interactions with customers and potential customers. It should streamline sales management processes to deliver increased sales, improved customer service and increased profitability.

We believe that a CRM solution integrated with Microsoft's wider Office 365 (O365) and Power platforms helps to drive the maximum value for our customers. With this in mind, we have created our PowerStart solution to leverage the wider Microsoft cloud platform.

Our PowerStart solution

For many businesses planning a move to a new CRM system can be a little overwhelming, with a variety of product options and price points especially as this sits outside of the existing O365 platforms such as Outlook and SharePoint.

Our PowerStart CRM solution leverages Microsoft's Dynamics 365 platform to record the most important data of all – leads, customers, contacts and sales opportunities. Each area of the solution (entities) can be customised to remove fields that are not relevant and to add specific details in line with your business needs.

The solution organises this information to give you a complete record of individuals, companies and deals, so you can better understand your interactions, relationships and pipeline over time. You can have an overall view of each entity by recording all interactions for analysis and storing documents in a standard format so that information can be found quickly by everyone.

Whilst Dynamics is at the core of our solution, we have built connectivity into other tools within O365 such as Power BI, PowerApps and Flow to offer complete end to end management of one

of your most important assets – your data. This ensures that all the key aspects of managing your companies' sales and teams is seamless such as pipeline management, proactive sales stage notifications, proposals and commission tracking. We can even integrate into Microsoft Teams so that the wider team outside of just your Sales function can work together on documents and communications related to leads and potentials deals/projects.

Our goal is to help you by enabling you to be more informed and productive by leveraging your existing investment in Microsoft 365 alongside your CRM solution.
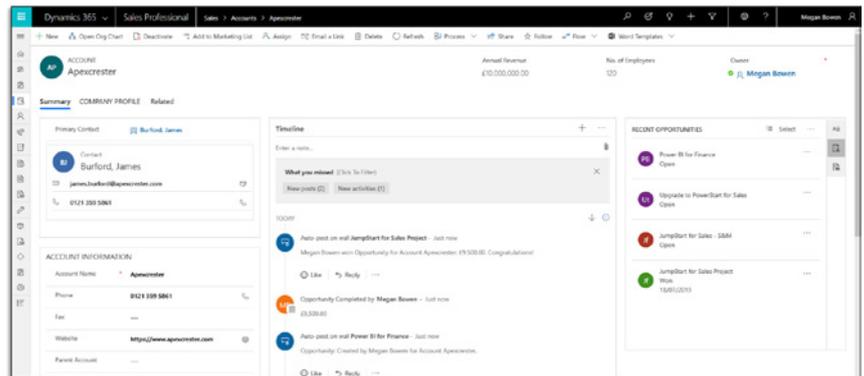
Why is this better than 'off the shelf' Dynamics CRM?

PowerStart offers you a well thought out, simplified and integrated solution that has the following advantages:

- All complexity and confusion removed, offers a clean and simplified experience
- All non-relevant fields removed and your specific fields added[*1]
- A structured sales process defined
- Pro-active email notifications, managed by our Sales Notifier App
- Advanced Dashboards and reporting utilising Power BI
- Account and Opportunity references added for easy identification
- Separate database for BI analytics
- Data imported from your old CRM system[*2]
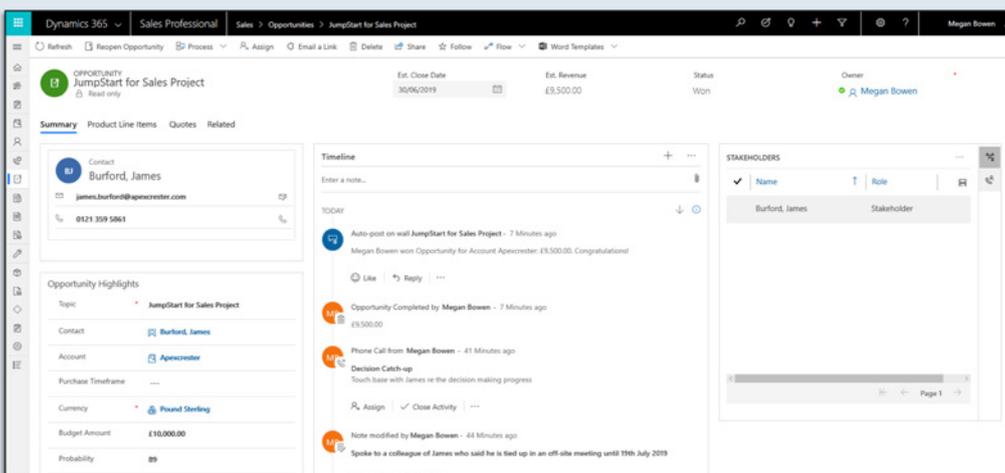
*1 Maximum number of fields across all entities is applied

*2 Export data to be in a suitable format i.e. Excel or CSV, maximum records apply

What you can do with PowerStart from Circyl

Forging good relationships and keeping track of prospects and customers is crucial for customer acquisition and retention, which is at the heart of our solution. You can see everything in one place —a simple, customisable dashboard that can include things such as a customer's previous history with you, the status of their orders and any pipeline of future opportunities.

We combine this with what we believe are the key additions to any CRM solution to ensure you have a tailored sales force management tool. Our goal is to include everything you will need to help you manage opportunities more efficiently and gain clear insights that will enhance performance.

- Comprehensive dashboards that provide performance trends and forecasting
- Pro-active notifications to ensure you are always informed on key sales activities
- Proposal and commission management and reporting
- Integration with Microsoft Teams
- Managed folder structures in SharePoint and OneDrive for business keeping your documents in sync at all times

Have an accurate sales analysis and forecasting on-demand

Interactive dashboards driven by real-time data covering key metrics such as high-level customer and sales performance to detailed views of actuals vs target, pipeline forecasting and commission analysis.

Use Pro-active alerts to drive actions and decisions

Use proactive alerting to ensure that all employees are kept fully aware of key actions and activities related to customers, opportunities and projects. When an email notification is received, simply click on the active link to take you directly to CRM. Notifications can be easily maintained by you on any device to update the people that receive them.
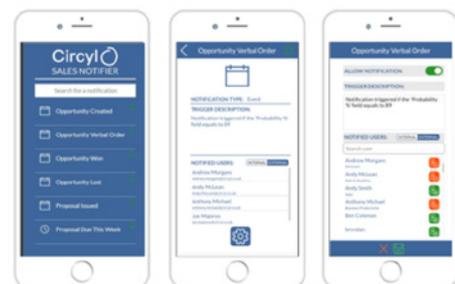
What we deliver for you with PowerStart?

Delivered is as little as 2 weeks, you will benefit from the following:

- Setup of a new Office 365 tenant if required
  - Creation of a new Dynamics 365 instance
  - Creation of SQL Azure
  - Assignment of licences to users
- Creation of Business Units and Security Roles
  - Assignment of Business Units and Security Roles to users
- Configuration of Server-side Synchronisation
- Deployment of the Power BI Dashboards and Sales Notifier PowerApp
- Basic customisation of Contact, Account, Lead and Opportunity entities (maximum of 75 fields across all entities)
  - Customisation/creation of views (maximum of 5 views)
  - Customisation of a new 'lead to opportunity' sales process (maximum of 6 stages)
  - Customisation of a new opportunity sales process to match above process (maximum of 8 stages)
- Additional fields and entities to manage Proposals and Commission tracking
- Import of Accounts, Contacts, Leads and Opportunities using provided templates (up to 100K contacts)
- Creation of a new Sales Dashboard view
- Handover training and 2 hours of post-live support

PowerStart gives you a comprehensive solution built for today, but also a scalable platform for future integration, data external to CRM, Insights and notifications.

This document gives you a flavour of what we offer, but for a more in-depth discussion on how the solution can enhance your business, please get in touch and we can discuss what PowerStart could mean to you.

PowerStart is provided on a fixed fee basis of £8,950. Software licenses are extra and are outlined below. Any services beyond the scope of the PowerStart are provided on a time and materials basis.

The Microsoft license costs:

- Dynamics 365 for Sales Enterprise – £71.60 per user, per month
- Power BI Pro licence - £7.50 per user, per month
- Team Member (for light usage) licence – £6 per user, per month