Circyl

CUSTOMER PRESENTATION

WWW.CIRCYL.CO.UK

ABOUT US

Circyl
Information Management Experts

We enable you to be more informed and productive, leveraging your existing investment in Microsoft 365, differentiating you from your competition
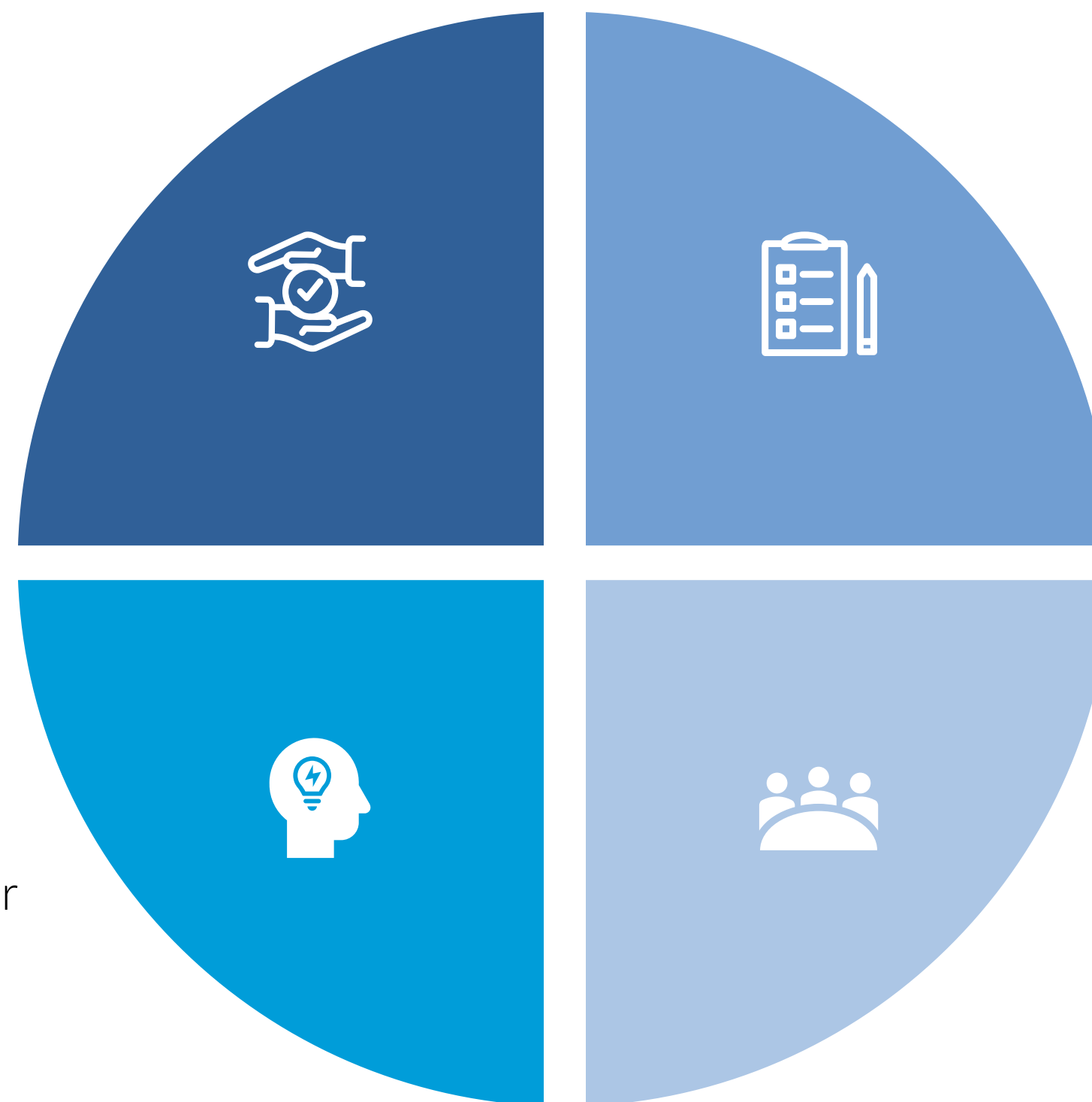

Business Productivity

Streamlining business processes using core Microsoft Platforms

- Document Management

- Collaboration & Communication

- Information Governance

- Automation

Data Analytics

Combining key data sources to deliver business insights with Power BI

- Business Intelligence

- Dashboards

- Reporting

- Business Insights / KPIs / Bots

CRM & Business Platforms

Managing interactions with your customers using Microsoft Dynamics 365

- End-to-End Business Solutions and Data Capture

- CRM

- Workflows

- Integration

Project Management

End to end Project Management in an Agile or traditional Waterfall manner

- Agile – Flexible Requirements

- Waterfall – Fix Requirements

- Hybrid – Time-boxed

Support

Dedicated support function with priority triage to a relevant subject matter expert

CUSTOMER PRESENTATION

WHY CIRCYL?

Circyl are uniquely positioned to support your customers in all phases of their Digital Transformation and Data Strategy; from information Capture through Integration and Analysis to Collaboration

1 Experts
Specialist experience in Information Management and Data Analytics

2 Integration
Uniquely positioned to deliver an integrated business platform

3 Results
Demonstrable track record with project-focused customers

4 Trust
Trusted partner with long-term customer relationships

5 Flexibility
Flexible delivery approach based on customer success

6 Value
Focused on delivering both business and technical value

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HM Government
G-Cloud
Supplier

Microsoft
Partner
Microsoft

CYBER ESSENTIALS
CERTIFIED

DATA IS JUST THE BEGINNING

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Raw Data

Migration
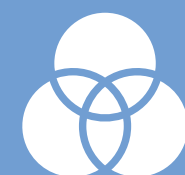
Capture	Integrate	Analyse	Collaborate
Dynamics 365	Power Automate	Power BI	Microsoft 365
Power Apps	Power VA / Bots	Data Warehousing	Teams
Excel	APIs	Data Modelling	SharePoint
Custom Development	Integration Hub	Data Visualisation	Power Pages / Portals
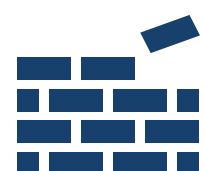
Business Insight

DATA ECO-SYSTEM

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1 What data do I require?
Do I have the right data?

Data Capture

2 How do I capture data?
Are we using the right systems?

Data Systems

3 How is data related and integrated to create a single version of the truth?

Data Integration

4 What do I need to make the right decisions for my business?

Reporting & Analysis

5 How do I guarantee quality and accuracy?
Who has access to my data?

Data Governance

6 How can I create a culture where data drives daily activities?

Training & Adoption

A TYPICAL DATA CHALLENGE
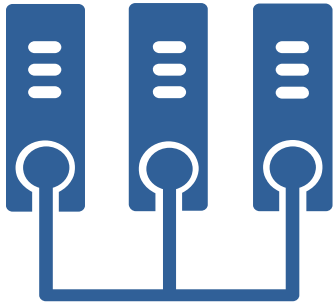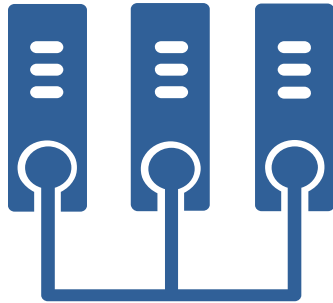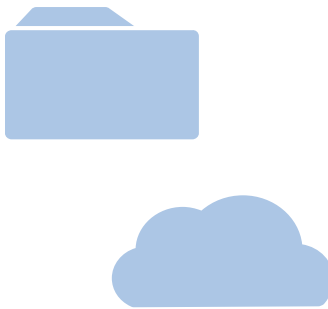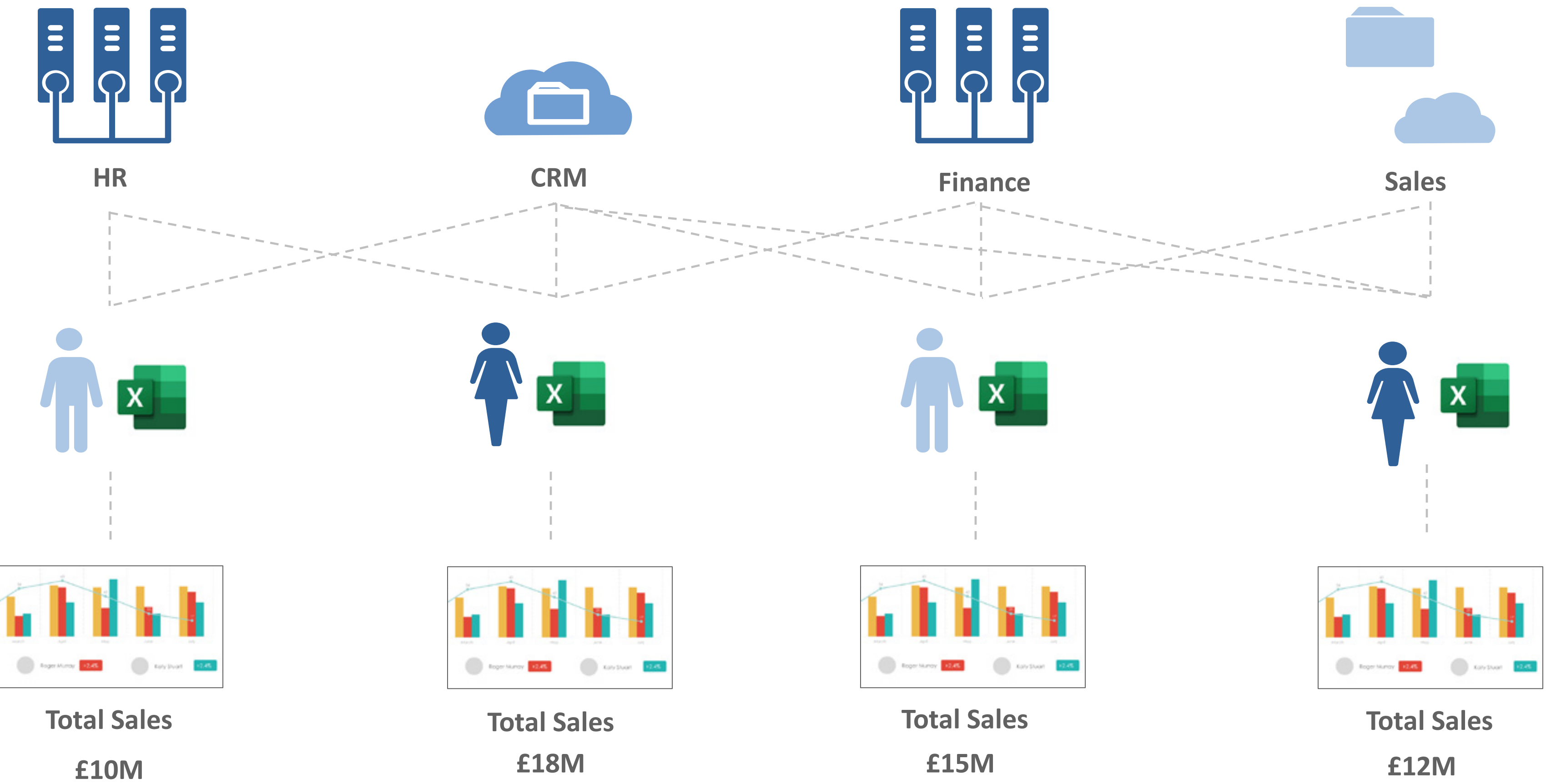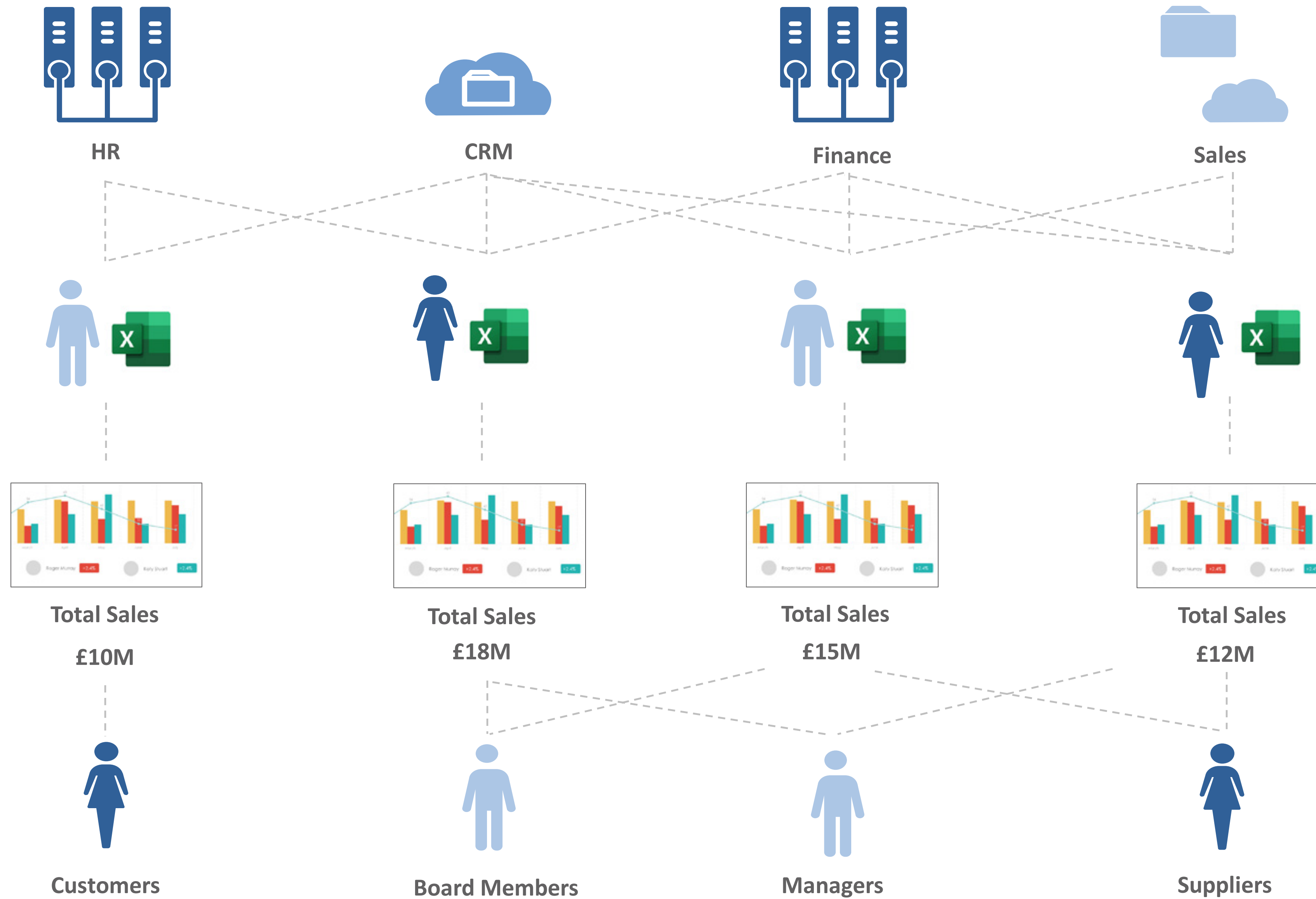
HR

CRM

Finance

Sales

A TYPICAL DATA CHALLENGE

HR

CRM

Finance

Sales

A TYPICAL DATA CHALLENGE

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HR

CRM

Finance

Sales

Total Sales
£10M

Total Sales
£18M

Total Sales
£15M

Total Sales
£12M

Customers

Board Members

Managers

Suppliers

A TYPICAL DATA SOLUTION

HR

CRM

Finance

Sales

A TYPICAL DATA SOLUTION

HR

CRM

Finance

Sales

Centralised Data Model

A TYPICAL DATA SOLUTION

HR

CRM

Finance

Sales

Centralised Data Model

Total Sales

£15M

Total Sales

£15M

Total Sales

£15M

Total Sales

£15M

Total Sales

£15M

A TYPICAL DATA SOLUTION

HR

CRM

Finance

Sales

Centralised Data Model

Total Sales

£15M

Total Sales

£15M

Total Sales

£15M

Total Sales

£15M

Total Sales

£15M

Customers

Board Members

Managers

Suppliers

Analysts
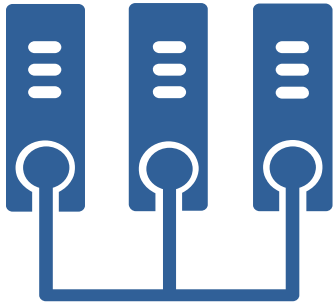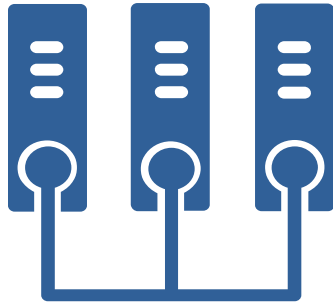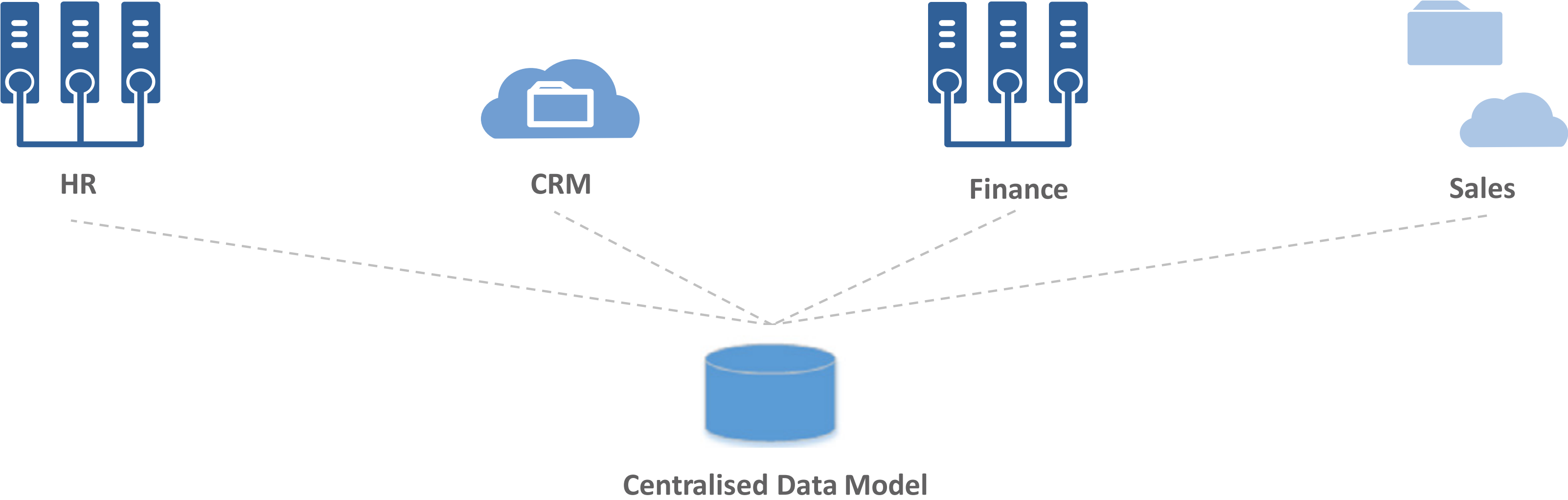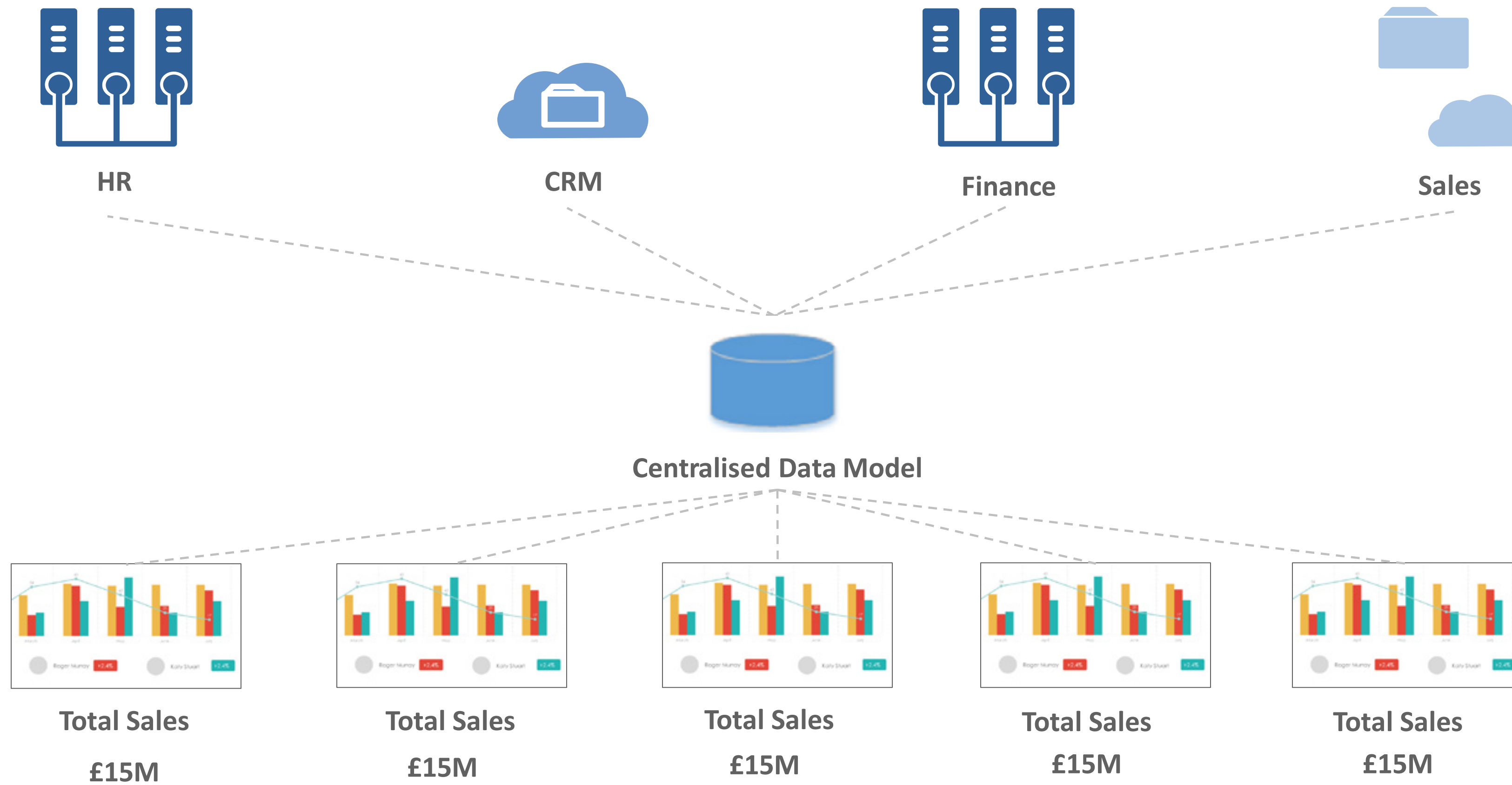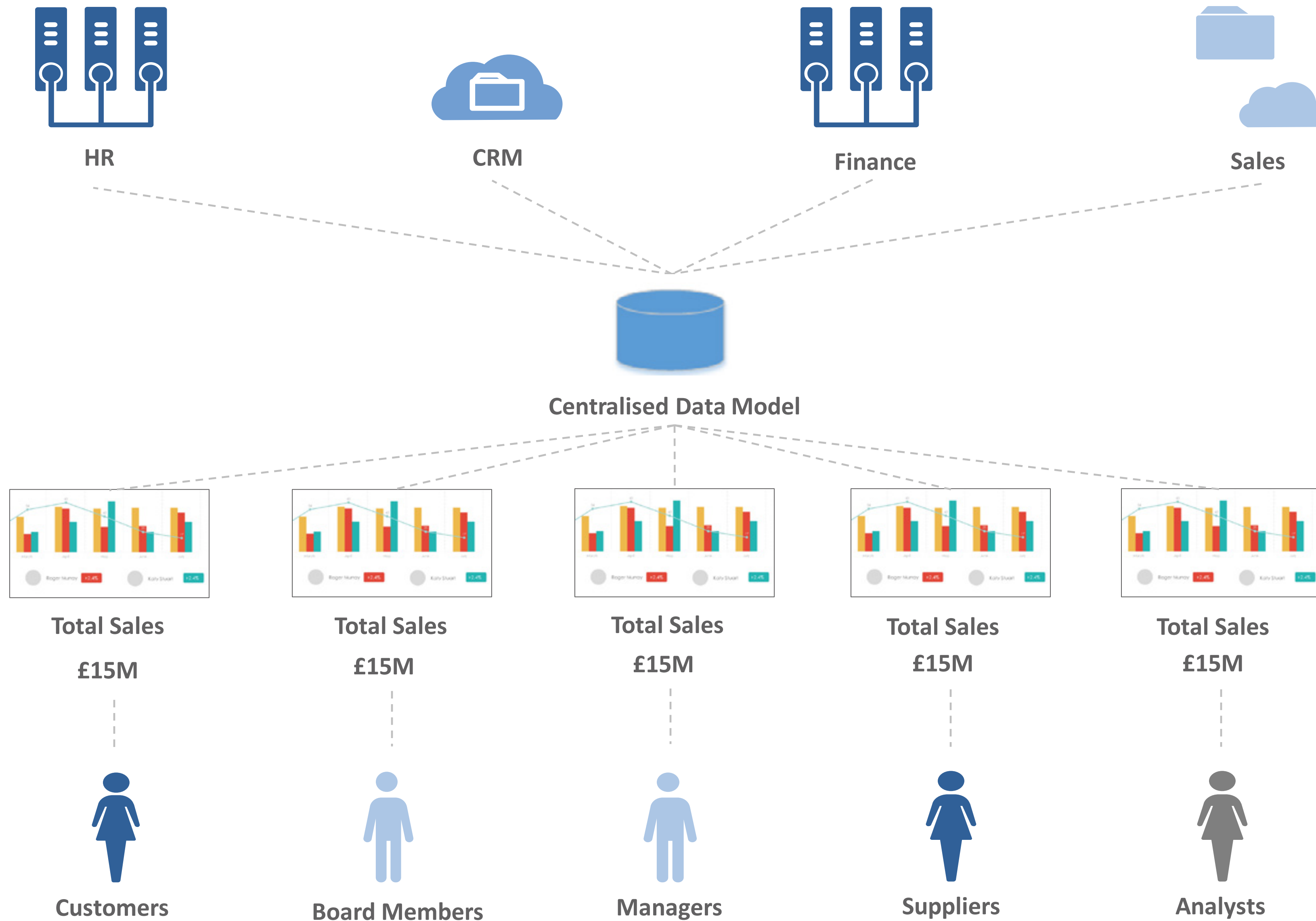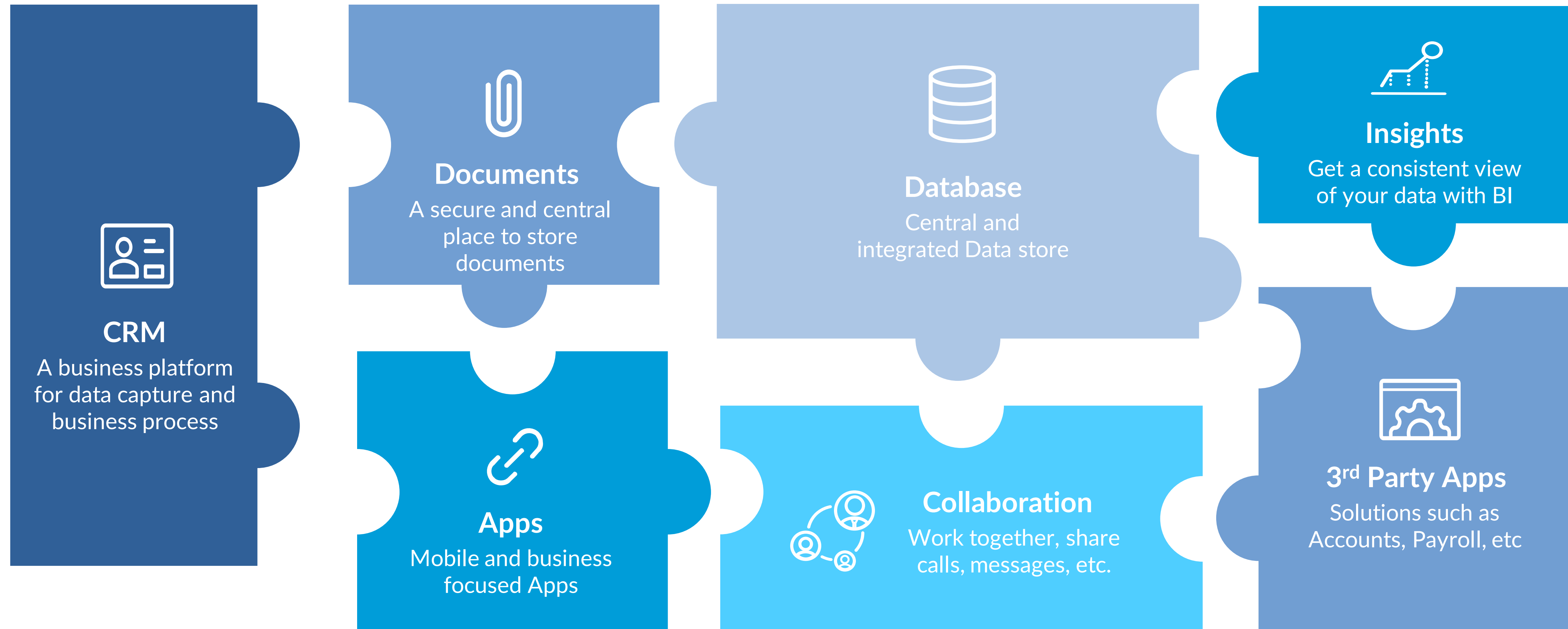
DATA AND APPLICATION INTEGRATION

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SharePoint   SQL Azure   Dataverse   Power BI

Dynamics CRM 365

CRM
A business platform for data capture and business process

Documents
A secure and central place to store documents

Apps
Mobile and business focused Apps

Database
Central and integrated Data store

Collaboration
Work together, share calls, messages, etc.

Insights
Get a consistent view of your data with BI

3rd Party Apps
Solutions such as Accounts, Payroll, Adobe, etc

Power Automate

Power Apps   Teams   Adobe Sign   sage

Leveraging the Microsoft 365 platform, utilising single sign-on and security

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ALAN D DUNCAN, GARTNER DATA AND ANALYTIC PREDICTIONS

"By 2024, 30% of organizations will invest in data and analytics governance platforms, thus increasing the business impact of trusted insights and new efficiencies."

INTEGRATED APPS AND INSIGHT EXAMPLE

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Outlook Email

- New Deal Created
- Proposal Issued
- Deal Verbal Order
- Deal Closed Won
- Deal Closed Lost
- Project Started
- Forecast Overrun
- Support Case Created
- Support Case Resolved

Email alerts

Chat Bot notifications

Dynamics CRM 365

Sales | Timesheet

Service / Support | Marketing

- Proposals
- Support Contracts

DocuSign - Services Contracts

Adobe Sign - NDAs

PMO

Power Apps

Holiday | Expenses

- Holiday Booking Request
- Holiday Approved/Rejected

- Expense Claim Submitted
- Expenses Approved/Rejected

- Order Confirmation

Order Confirmations

Central Data store & Dataverse

Power Virtual Agents

- "Show me total sales for 2022?"
- "Show me a Consultants availability?"
- "Show me how much we invoiced?"

SharePoint

Power BI

SQL Azure

Dataverse

Reporting & Analytics

- Company, Customer & Project P&L
- Resource Utilisation
- Overall Customer View
- Service Cases and Support
- Sales Actuals, Pipeline & Commission
- Holidays and Expenses
- Billing and Collections

Operational Intranet | Project Delivery

Power Automate

Announcements

OneDrive

Any Time | Any Where | Any Device

Sales Account Documents

Sales Opportunity Folders / Documents

O-123 – ABC Opp
O-987 – ZYX Opp
O-749 – GHI Opp

Folder Management

Automatically create Teams

Teams

Teams Site for each Customer & Channel for each Project

Chat
Wiki / notes
Files and documents
Link to CRM documents – Sales

Accounts

sage

Any Time | Any Where | Any Device

Buyer Persona

![Circyl — Information Management Experts]

Engagement

Initial engagement on a small Discovery and Analysis phase, eventually becoming a partner with Circyl; a safe pair of hands and "trusted partner" for data integration

Frustrations

- Too many disparate systems
- No ability to keep data in sync
- Cloud and on-prem integration

Goals & Needs

- Near real-time data synchronization
- Ability for cloud and on-prem solutions to be integrated
- To be notified if data feeds are not working correctly

IT Manager

Law Firm

Buyer Persona

Group Process Improvement Manager

Large Food Manufacturing Company

Engagement

Having delivered several subsequent engagements, we had a proven track record of success. A new requirement to streamline business processes and increase efficiency gains were key whilst leveraging the existing M365 platform

Frustrations

- Too many disparate systems
- Manual and inconsistent processes
- Too much reliance on Excel

Goals & Needs

- Streamline business processes
- Provide audit and accountability
- Save time by removing single point of failure/delay

Buyer Persona

Engagement

Having initially delivered an on-premise Data Analytics platform, we were engaged to modernise the solution buy moving to the latest Microsoft cloud platform to align to their new cloud-based Practice Management System.

Frustrations

- Data silos with no signal version of the truth
- Manual and inconsistent processes
- Too much reliance on Excel

Goals & Needs

- Centralised data warehouse
- Strategic and cloud based
- Consistent and trusted data and reporting

Senior Partner

Global Law Firm

THE CHALLENGES WE HELP WITH

ARE THESE SOME OF YOUR PROBLEMS?

• ARE YOU HAVING CHALLENGES WITH GETTING THE REPORTING YOU NEED IN A TIMELY FASHION?

• DO YOU HAVE LOTS OF REPETITIVE MANUAL TASKS IN YOUR BUSINESS- DISJOINTED SYSTEMS?

• DO YOU FIND IT DIFFICULT TO FIND INFORMATION AND DOCUMENTS?

• YOU CANNOT GET A SINGLE VIEW OF WHAT YOUR CUSTOMERS ARE DOING WITH YOU?

WHAT WE OFTEN HEAR FROM OUR CUSTOMERS

• "IT TAKES ME TOO LONG FOR ME TO GET THE NUMBERS I NEED, ITS TOO LATE TO TAKE ACTION"

• "THERE ARE TOO MANY REPETITIVE MANUAL TASKS-DATA IS INCONSISTENT, WHICH VERSION IS CORRECT?"

• "I CAN'T FIND THE DOCUMENTS I AM LOOKING FOR AND OFTEN HAVE TO RECREATE THEM"

• "I FIND IT DIFFICULT TO SEE HOW WE INTERACT WITH OUR CUSTOMERS"

• "WE ARE IN EXCEL HELL"

CROSS-FUNCTIONAL TEAM

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There is huge value in working with a team that spans many complimentary business and technical disciplines. The power of data, integration and business process combined.

DATA ANALYTICS

Turning raw data into information for decision-making activities through integration and interactive Dashboards and Reporting

BUSINESS PRODUCTIVITY

CRM as a business platform and Power Platform technologies to enhance productivity, business process, integration and data capture on PC or mobile device

APPLICATION DEVELOPMENT

Web or mobile applications that sit outside of the Microsoft 365 Platform
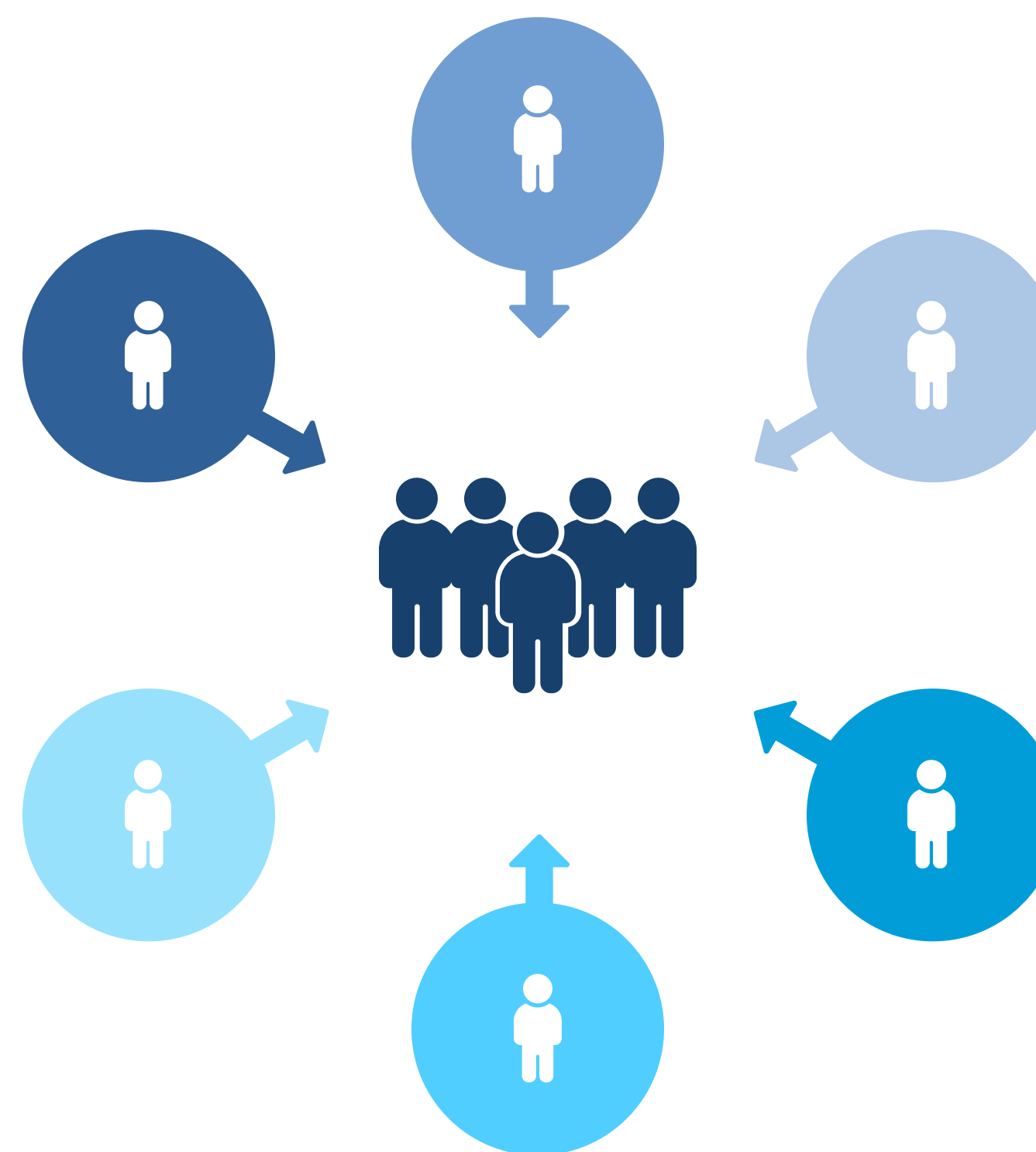
PMO

Centralised function that coordinates project delivery and success, process, people and customer satisfaction

TRUSTED ADVISORS

Experienced track record of Customer and Partner success at all levels and verticals – consultative and focused on positive business outcomes

SUPPORT

Support for all Circyl solutions as standard, with a dedicated team and priority triage to the project SME for rapid resolution of queries and issues

OUR APPROACH TO DELIVERY

We have a hybrid approach to project management which allows us to apply the best tools of a varied set of methodologies to suit the needs of the customer.

Agile

Whilst a Discovery Phase may have happened, the client still wishes to have the flexibility to change. The client wishes to be very involved in the day-to-day delivery of the project via collaboration. There is no fixed delivery date.
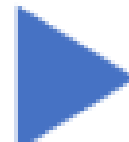
Waterfall

We have clear, documented requirements that are unlikely to change. There is a fixed delivery date which is the priority of the project. Any non-critical changes can be picked up following the initial deployment.

Hybrid

There is a desired delivery date, but the final requirements are not yet known so a more flexible approach is required. Work can be time-boxed so that a specific number of sprints can be delivered in a given time period.

OUR APPROACH TO DELIVERY

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Circyl Delivery Process

	Planning	Analysis	Development	UAT	Project Closure	Support
Activity	Project Kick Off	Design Sprint	Development Sprint (n)	UAT Sprint (n)	Documentation & Handover	Support Contract
Outputs	• Kick Off Meeting • Stakeholder Analysis • RACI • Comms Plan	• Stakeholder Workshops • Solution Design Document • Product Backlog • Project Plan • Solution Presentation	• Sprint Planning • Agile Sprint(s) • Daily Stand Ups • Sprint Retrospective • Repeat for number of sprints (n)	• UAT Cycle • UAT Fix Cycle • Repeat for number of UAT Sprints (n)	• Solution Documentation • Handover Session(s) • Project Sign-Off	• Live after Warranty Expires • SLA's • Draw Down Days
	Project Management					Helpdesk

CUSTOMER PRESENTATION

GET IN TOUCH WITH US

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