Circyl
The Digital Transformation Experts

# QuickStart for Sales CRM

**Finding and implementing an effective CRM system can be challenging, with many businesses either overwhelmed by the prospect of moving their existing operations or confused by the amount of choice on the market. Our QuickStart for Sales CRM simplifies the tailoring process, ensuring you find a solution that meets your unique needs and requirements with the correct components included.**

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.

## Our Dynamics 365 CRM QuickStart solution

For many businesses planning a move to a new CRM system can be a little overwhelming, with the variety of product options and price points available.

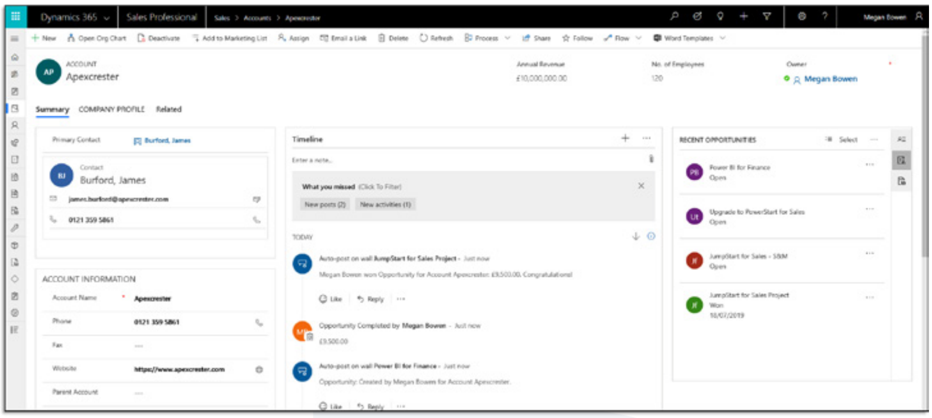
Our fixed-cost QuickStart for Sales solution makes tailoring the process simple, allowing you to select from options that suit your business size and requirements and ensure you have a core platform matched to your needs.

Our QuickStart 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.

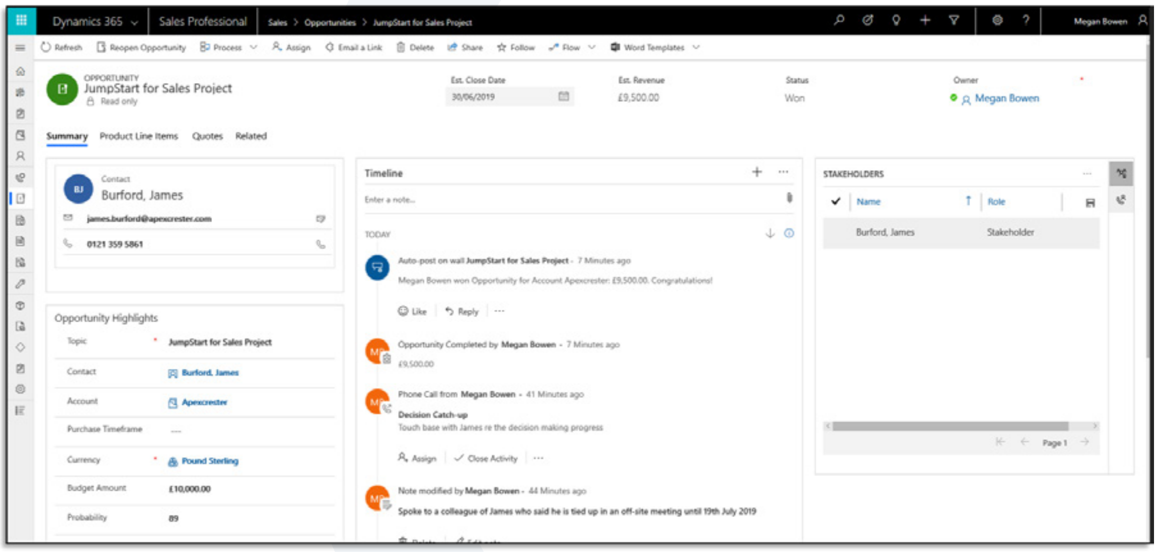
With this approach we can simplify delivery, cost and accelerate project timescales, whilst ensuring on-going success and enthusiastic adoption of the solution across your organisation.




## Why is this better than 'off the shelf' Dynamics CRM?

Our QuickStart offers you a well thought out and simplified solution that has the following advantages:

- All complexity and confusion removed
- Offers a clean and simplified experience
- All non-relevant fields removed
- Your specific fields added[1]
- A structured sales process defined
- Account and Opportunity references added for easy identification
- 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 QuickStart from Circyl

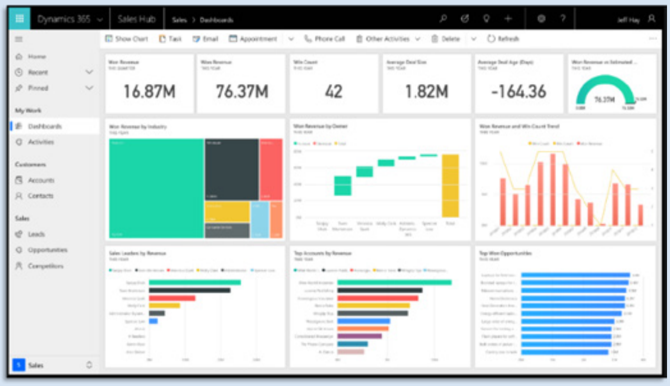
Forging good relationships and keeping track of prospects and customers is crucial for customer acquisition and retention, which is at the heart of our solution.

You can see everything in one place —a simple, customizable 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 include everything you will need to help you manage opportunities more efficiently and gain clear insights that will enhance performance.

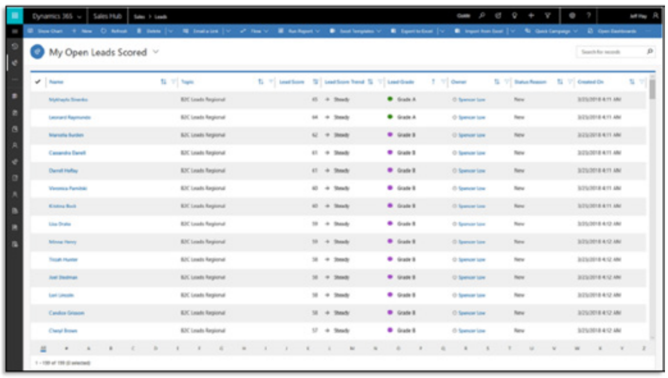
### Have an accurate sales analysis and forecasting on-demand

From short term goals to longer term targets, use Dynamics 365 to understand sales performance and activity to drive decision making.  Spot issues and trends with interactive dashboards driven by real-time data.



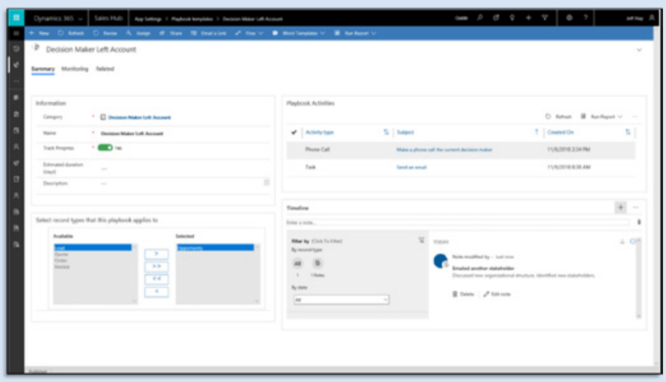

### Avoid guesswork and make informed decisions

Use Dynamics 365 to see current status of leads and opportunities. Use filters to review sales stage, timeline and status to determine the best use of time to either progress or qualify out as early as possible.




### Ensure your teams focus on selling

Onboarding and training requirements are minimal as Dynamics 365 uses the industry standard Microsoft toolset during every phase of the sales cycle. Save time with simplified data entry with contextual prompts that suggest new records to create as sellers enter notes.



## What we deliver for you with QuickStart?

Delivered in 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
    - Assignment of licences to users
- Creation of Business Units and Security Roles
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- Configuration of Server-side Synchronisation
- 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)
- 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

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 QuickStart could mean to you.

QuickStart is provided on a fixed fee basis. Software licenses are extra and any services beyond the scope of the QuickStart are provided on a time and materials basis.