



CRM DYNAMICS

PROFESSIONAL SERVICES BLUEPRINT

POWERED BY
MICROSOFT DYNAMICS 365

What is Professional Services Blueprint?

Professional Services Blueprint is part of the Dynamics Blueprint series from CRM Dynamics powered by Microsoft Dynamics 365.

In today's digital age, building a trusted relationship and maintaining a solid reputation on project delivery, while exceeding customer expectations is the new standard. You engage in a highly personalized experience with your customers and the Professional Services Blueprint will allow you to better manage your sales pipeline, manage customer relationships and have better oversight of your projects.

Top 3 reasons why you need Professional Services Blueprint:



Configured for Professional Services

This solution is configured to support a 360-degree view of your business.



Team enablement

This solution provides your team members with a common platform for sharing information.



A platform for the future

You can think of the blueprint as laying the foundation for the future, with options that you can add over time including Project Management, Marketing, Artificial Intelligence, Telephony and ERP.

Our solution has a proven track-record of helping companies meet their goals. Contact us today to see how Professional Services Blueprint can benefit you. Visit our website [here](#) or contact us at experts@crmdynamics.ca

Professional Services Blueprint Core Features



360-degree view of the customer

Provide insights into your customer data that includes 360-degree view on customer's journey from lead generation, opportunities, proposals, implementation and many more.



Customer Services

Connect to your customers and work from anywhere with an internet connection.



House Holding

Group a series of contacts under one household: show information related to the household such as past sales and projects.



Project Oversight

Project oversight capabilities including key project attributes, team activities and document management. Projects can include those with set start and end dates in addition to ongoing service contracts



Reporting & Analytics

The solution includes robust queries, chats, dashboards, as well as Excel reporting integration. It optionally works with Power BI to provide best-of-class analytics.



Demographic and Segmentation

Provides you with the opportunity to group your contact list so you can personalize and focus on your messaging to your customers.



Cloud Telephony

Optional:
Extend omnichannel to include VoIP telephony.



Training

The solution includes training assistance on solution functionality. it also includes a Gap process and core platform how-to documentation

Professional Services Blueprint

Advanced Features

We have many advanced features for the higher education blueprint that are optional in addition to our core features.



Event Management

Seamlessly accept registrations, track attendance and payment processing.



Account Management

Provides account management capabilities, including account planning, sales and forecast by product category, wallet share and team member coaching.



Project Management

Offers project management with resource management, Gantt charting, billing, time entry and many more features that project managers expect.



LinkedIn Integration

Use LinkedIn integration to better manage relationships and grow your business.



Marketing Communication

Potential to elevate your communications with easy to use targeted marketing campaigns, personalized messages, and manage subscription lists for CASL compliance.



Virtual Chat Agent

Add Chat Bot capabilities to assist customers with most common issues 24/7/365.



Web Chat

Communicate with customers via easy to use web chat functionality.

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Professional Services Blueprint Advanced Features

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Booking Portal

Customers can book time with your advisors on-line without having to visit or call your office. This includes qualification capabilities that can be either automated or person assisted. Booking can be accomplished from your web-site, customer portal, or Chat Bot.



Customer Self Service Portal

Allows your customers to easily manage their profiles with minimal support. It can also be configured with additional self-service capability such as Cases, Project Communications, e-commerce and Knowledge Base. The portal can be integrated seamlessly with your existing website.



Customer Segment Modeling

Dynamics includes customer modeling tools including AI and PowerBI.



ERP Integration

Leverage Dynamics Business Central or Finance & Operations for your Enterprise Resource Planning needs.



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