

DYNAMICS 365

CREATE A 360° CUSTOMER VIEW WITH DYNAMICS 365

Developing meaningful connections with customers has never been more important, yet leveraging customer data enterprise-wide has never proved more challenging. Dynamics 365 is an end-to-end, Cloud-based CRM platform that integrates Sales, Marketing, Field & Customer Service, Operations and Finance. Built to natively access Office 365 and effortlessly support mobile users, Dynamics 365 provides a single customer relationship platform to drive more sales while streamlining manual processes.

Featured Partner:



OUR APPROACH

Phase 1: Dynamics 365 Foundation

- > Plan & Define Assessment
- > Basic Functionality:
 - > Sales Management
 - > Case Management
 - > Native Marketing
 - > Dashboards & Reporting
 - > Document Management
 - > Outlook Activity Tracking
 - > Mobile App
- > Integration of:
 - > Skype
 - > SharePoint Online
 - > One Note

Phase 2: Advanced Modules

- > Azure Machine Learning
- > Social Engagements
- > Field Service
- > Project Service Automation
- > Portals
- > Third Party Integration
- > Advanced Marketing

Phase 3: Enhancements

- > Department Specific Needs
- > Custom Development & Integration
- > Application Consolidation
- > Advanced Metrics & Power BI

**MICROSOFT
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COMPETENCY
CRM**

**DYNAMICS 365
2017 SERVICE
LEADER**
CRM MAGAZINE

✓ WHAT TO EXPECT

Improve your end customer experience across the buying journey—from initial lead through happy lifetime customer:

- Integrate with social media tools to identify new prospects
- Access customer insights for meaningful outreach
- Effectively track leads and opportunities
- Increase visibility of sales pipeline & close rates
- Track marketing efforts & ROI
- Track cases & service management requests
- Leverage the full capabilities of O365 natively
- Connect with finance and accounting tools
- Streamline enterprise-wide reporting

Optimize your investment with Dynamics 365 in the Cloud—decreasing IT costs and increasing your agility via cloud capabilities and resources.

📁 EXPERIENCE COUNTS

With proven experience implementing 60+ customized Dynamics 365 solutions for enterprise clients across a wide variety of industries, our team can drive the process from start to finish. From migrating clients' legacy sales and service applications to developing mobile solutions to support remote sales and service personnel, we offer unmatched expertise in delivering turnkey CRM solutions.



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