



CRM QUICK START FOR YOUR SALES TEAM

5 DAY WORKSHOP

XRMVISION.COM



Creating and implementing a CRM Solution to elevate your Sales Team's processes.

A fully functional CRM solution installed and configured within 5 days? Yes, it's possible! These 5 days will cover important aspects for your sales team, to configure Microsoft Dynamics 365 for your business needs.

Benefits:

- ◆ Client data centralization
- ◆ Elimination of the use and continuous updating of Excel sheets
- ◆ Access to your data on the go
- ◆ Standardisation of your account management
- ◆ Optimized process for converting and tracking opportunities
- ◆ Global view of key performance indicators (KPI) related to sales

SCHEDULE

- ◆ Day 1
 - Analysis of sales team's business needs.
 - Analysis of sales-related business processes – lead management, account and contact management, opportunity management.
 - Recommendations on which business processes to integrate within your CRM.
- ◆ Day 2
 - Deployment of environments and purchase of licences
 - The configuration of the sales module (accounts, contacts, activities, prospects, opportunities)
 - Customization of forms
 - The configuration of a business process flow (prospect to opportunity)
- ◆ Day 3
 - The configuration of business rules and automation
 - Implementation of the dashboard for managers and representatives
 - Creation of the sales funnel and the relevant graphics
 - Deployment in the production environment

Founded in 2008 in Montreal, XRM Vision is a human-sized CRM consulting firm driven by expertise and commitment. We specialize ourselves in creating and implementing Customer Relationship Management solutions, powered by the Microsoft Dynamics 365 universe.

- ◆ Day 4
 - Enabling email boxes
 - Installation and synchronization of mobile applications
 - Integration with Outlook
 - Tests and Validation
- ◆ Day 5
 - Adjustments according to tests and validation results
 - Creation of users in the CRM
 - Training of users

DELIVERABLES

A functional CRM solution online

An integrated process for incident management

Integration of incoming email to CRM

A dashboard with graphics for the managers and representatives of the sales team

Trained and independent users

