

## DO YOU FEEL STUCK WITH YOUR OUTDATED, ON-PREMISE CRM SYSTEM?

Did your business implement Microsoft Dynamics CRM On-Premise before cloud became the standard, and you now feel restricted by the time and resources it would take to migrate to the latest cloud-based solution?

If so, you're not alone. Yet the longer you wait, the more issues you'll continue to have with your unsupported version — from update and functionality limitations, to the mounting costs it takes to maintain your outdated hardware and software in house.

As Microsoft Dynamics 365 experts, we know your pain. Fortunately, we also know how to fix it.

### MIGRATE IN HALF THE TIME – FOR HALF THE COST

Leveraging 20 years of expertise, we've developed the industry's only quick and easy solution to seamlessly migrate your data from an on-premise version of Microsoft Dynamics CRM (365) to the latest innovative Microsoft Dynamics 365 cloud solution – for less than the cost of migration to a completely different system.

TrellisPoint can help ease the pain of transition. We've done the work ahead of time, pre-mapping all out-of-the-box data fields so you don't have to factor vast amounts of time and resources into your migration project.

### TAILORED FOR YOU – WITHOUT ANY DATA LOST

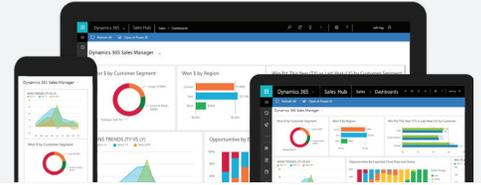
Knowing our way around both Microsoft Dynamics 365 versions, our experienced team can not only match the majority of your data quickly and accurately – but do so while ensuring you don't lose crucial information such as account data, sales opportunities or quotes along the way.

Have existing custom fields you need moved from your old system, or custom fields you'd like configured in the new version? We'll work with you to identify your current process needs, make recommendations for functionality improvements and data clean up, and ultimately redesign a Microsoft Dynamics 365 solution tailored with the right fields, entities and workflows in place to drive impact for your business.



# LEVERAGE THE POWER OF MICROSOFT DYNAMICS CLOUD-BASED CRM TECHNOLOGY

Why is cloud-based Microsoft Dynamics 365 for Sales the market's leading solution for salesforce automation, marketing, and customer service?



## DO BUSINESS ANYWHERE

Move from on-premise to the cloud for on-the-go accessibility from any device — no in-office network or VPN access required.



## INTEGRATE SEAMLESSLY

Many popular business applications and tools are native Microsoft platform integrations, meaning you can connect to Office 365, marketing, ERP and more through a single interface.



## AUTOMATE WORKFLOWS

Replace tedious manual tasks with automated sales, marketing & customer service processes using tools like PowerBI, Power Automate and PowerApps.



## SECURE YOUR DATA

Trust industry-best security features and set information access controls to protect your data, in compliance with GDPR, FINRA, HIPAA, SOX and many more.



## GET DATA LITERATE

Leverage robust, real-time dashboards to make better informed, data-driven decisions — empowered with the latest Microsoft capabilities.



## STAY UP TO DATE

Focus on running your business, not your software, with free, automatic system upgrades, performance monitoring and reliable support.

## NOT SURE IF YOU'RE READY TO MIGRATE?

If you're interested in improving your business processes and management of customer relationships through a more cost-effective, high-performing version of Microsoft Dynamics 365 for Sales, trust our team of dedicated professionals. After all, at TrellisPoint, CRM is all we do.

But don't just take our word for it. Contact us today to ask about our free on-premise to cloud migration trial!

We'll migrate up to 10,000 of your business' accounts and contacts from your on-premise version of Microsoft Dynamics CRM (365) to a 30-day free trial of cloud-based Microsoft Dynamics 365 for Sales at no cost or obligation to you.



Specializing in CRM systems since 1998, Trellispoint helps you plan, implement, configure, customize, and deploy CRM strategies and solutions in your organization.



[www.trellispoint.com](http://www.trellispoint.com)



1-888-719-0248



[sales@trellispoint.com](mailto:sales@trellispoint.com)