Microsoft Dynamics 365 CRM Opportunity Guide

CRM is a centralised repository for the information related to the front-end operations of an organisation.

Microsoft Dynamics 365 CRM can create process automation, deliver efficiency and provide data insight across key business functions.

Why QGate?

✔ We help SMBs optimise their business processes, transform the way their people work, and enhance their customers' experience through Microsoft Dynamics 365 CRM and Power Platform

✔ We have 25 years of experience delivering CRM, business process optimisation and digital transformation

✔ We conduct the majority of our business via our Partners, being trusted time and time again to deliver on-time and in-budget

Why Microsoft Dynamics 365?

✔ Highly customisable to suit individual business processes and requirements

✔ Integration with other familiar Microsoft business and productivity solutions

✔ Improves operational efficiency and productivity

✔ Connects the teams across your business on a single unified platform that can be accessed anytime, from anywhere

✔ Enables delivery of digital marketing and marketing automation

✔ Improve sales efficiency to win more sales and extend customer lifetime value

✔ Data held securely in the Microsoft Cloud

"Becoming a QGate Referral Partner has been great for Alphalogix. By being able to offer Microsoft Dynamics 365 to our customers, we have extended the services we offer and won new opportunities."

Paul Willis, Alphalogix

How to Spot a Dynamics 365 Opportunity

A guide to identifying signals that your customer needs a CRM.

General

! Data held in numerous spreadsheets, preventing collaboration and making auditing impossible

! Tasks carried out manually, causing inefficiency

! Unable to access data unless physically in the office

! Duplicate documents created and held locally by individuals

! Having to rely on being copied in on emails to keep up with customer conversations

! Manually having to take information from one system and enter it into another

! Poor control of data access and security across the workforce, resulting in possible GDPR exposures

Marketing

! Poor quality leads or a low level of lead generation

! Problems with lead handoff to sales team and reporting on lead conversion

! Sending only one-off emails - no ability to nurture or deliver personalised customer journeys

! Unable to capture data on social media interaction

! Low customer retention or lifetime value, due to poor upselling and cross-selling

! Lack of integration with online events/webinars

! Unable to analyse marketing campaign performance and calculate ROI

! Not able to identify customer segments and lists

Sales

! Lack of visibility of sales pipeline

! Losing sales due to missing key call back dates

! No access to sales notes whilst away from your laptop or PC

! Difficult to review historic sales data to compare year on year performance

! No visibility of prospect interactions across the sales team

! Quote and tender documents get lost or duplicated with different versions

! Unable to accurately forecast revenue generation for the next quarter or year

! Price lists become out of date due to frequent changes

Customer Service

! Having to manually create cases

! Poor management of support tickets

! Response time taking too long

! Cases getting lost or assigned to the wrong staff

! Often repeating the same resolution steps when tackling the same customer issues

! Overloading Customer Support staff due to no visibility of their workload

! Underutilising Customer support staff for the same reason

! Unable to monitor the time spent resolving customer issues

![QGate - CRM · Digital Transformation · Automation]

Real World Customer Examples

Creating a Single View of Customer Data

Ensuring that teams within a business have access to the same, up-to-date customer data is essential to improve productivity and to provide good customer service.

Our customer provides home furnishing products that are manufactured to bespoke requirements and then installed by field-based teams at customer sites. They approached QGate as they lacked a centralised view of information between the field team and the office-based sales and administration team.

QGate developed a custom mobile-based application, created in Microsoft Power Apps, for the field teams, integrated with **Microsoft Dynamics 365 Sales CRM**, for the office and logistics teams.

As well as creating a much-needed **single view of data** between office and field-based team members, the App has also delivered further productivity benefits. Data can be used with the company's existing cloud-based pricing calculator to produce quotations quickly and accurately. The App also helps field teams to plan their day efficiently by using Google Maps data to optimise routes and schedule customer site visits and whilst on-site they can easily upload information, images and video into customer records to accurately report and verifiy of their work.

Improving Lead and Sales Team Management

A leading Managed IT Service Provider were looking for a **solution to manage leads and sales processes, improve efficiency and reporting, and centralise sales and marketing data**.

The resulting Dynamics 365 CRM manages leads from initial enquiry, through qualification, to quotation and sales order. Users and sales management are able to access essential information on opportunities, accounts and sales outcome via a Power BI Sales Dashboard.

The organisation now plan to integrate their Dynamics CRM with Business Central, which they use for order processing and invoicing. This integration will create a seamless flow of data across several departments in the business, from initial enquiry through to finally invoicing the customer.

Microsoft
Partner