Incremental Group

Dynamics 365 Sales implementation

Incremental Group

A modern CRM solution to improve your sales productivity

Dynamics 365 Sales functionality

LEAD AND OPPORTUNITY MANAGEMENT

PRODUCTS, PRICE LISTS AND PRODUCT BUNDLES

QUOTES, ORDERS AND INVOICES

ORGANISATION CHARTS

SALES PLAYBOOKS

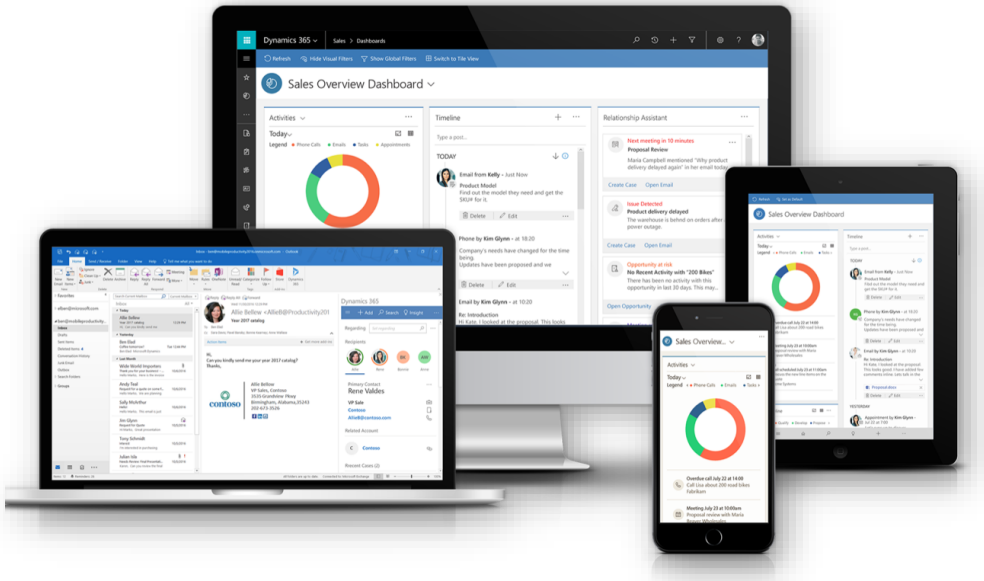
COMPETITORS, SALES GOALS AND TERRITORY MANAGEMENT

PARTNER RELATIONSHIP MANAGEMENT

Packaged offering

We offer a packaged Dynamics 365 Sales delivery approach.

Our approach is designed to get you up and running quickly with a new CRM solution that will deliver for your organisation.



What is included

- Templated data migration
- Training
- Set up of core entities and processes
- Set up of users and security roles
- User acceptance testing
- Go live

Designed around you

We start your implementation with product training and workshops with your team.

We gather your requirements and understand your business processes, to ensure we implement a CRM that truly delivers for your sales team.

Implementation

We deliver Dynamics 365 Sales in just 4-6 weeks

- Built around your requirements
- Configuration of core Sales capability
- Delivered by Dynamics 365 consultants and a project manager
- Including go live support and UAT

Data migration

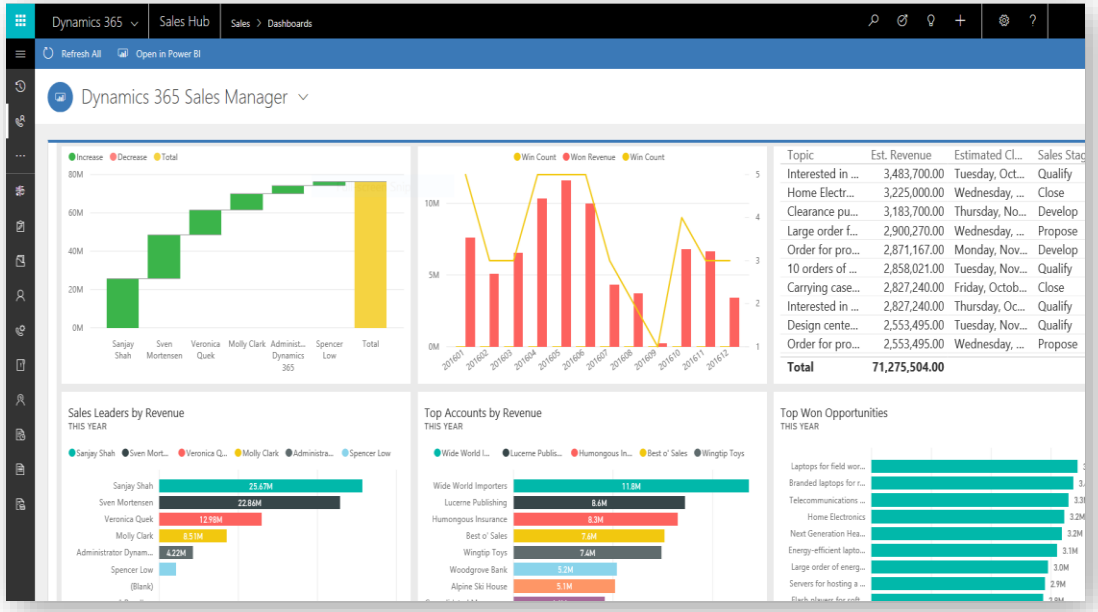
Data is the lifeblood of your organisation and Dynamics 365 Sales is the perfect home for your data.

We provide data migration templates to import core data into the solution. Including leads, contacts, opportunities and accounts.

Additional data migration services are available on request.

Reporting

Dynamics 365 Sales comes with a range of out-of-the-box reports to track and manage your sales team.



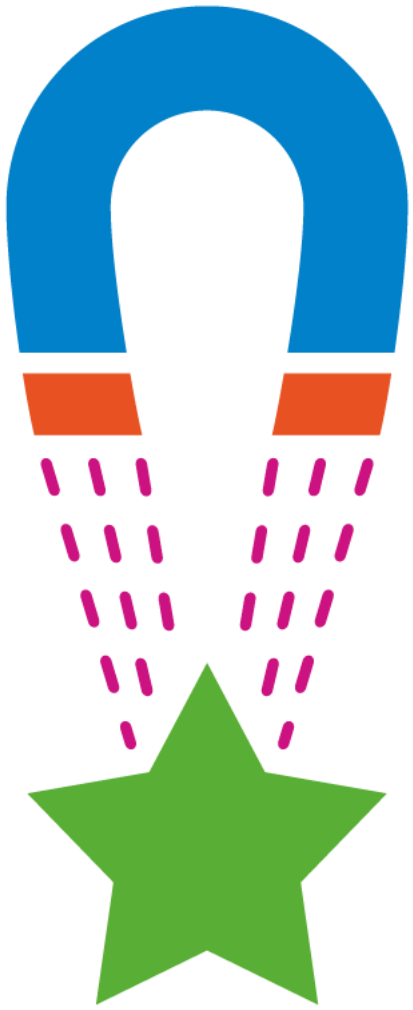
Training

User adoption is a critical factor in delivering business returns.

We provide 4 full days of training included as part of our implementation.

Our tailored training approach gets users involved early and ensures knowledge transfer throughout the process.

Our training is split across users and administrators to help you become self sufficient quickly.



Licenses

Licenses are on a per user per month basis

Sales - £71.60	This provides full access to the solution
Team Member - £6	For users who need limited access to the system, for read only, approvals and running reports

Licenses above refer to Dynamics 365 for Sales Enterprise.
A minimum of 5 full licenses apply.

Packages available

	Core	Premium
Description	Core is our entry level packaged offering that gets you a new CRM in just 4 weeks	Premium includes everything in core plus additional capability and set up
Time	4 weeks	6 weeks
Cost	£25,000	£35,000
Data Migration	Templated core entities migration	Templated core entities Configuration of single pricelist with pricelist items (Max 50)
Set up/Configuration	Core entities (accounts, contact, leads, opportunities, sales process)	• Core entities (accounts, contacts, leads, opportunities, sales process) • Orders, quotes and invoices included • Sales goals • Advanced Sales insight
Training	4 days included	4 days included
Users and security	Set up of users and security	Set up of users and security
UAT	Included	Included
Go live support	included	Included
Office 365 integration	X	SharePoint Online Outlook Web App
Themes and branding	X	Included

Additional capability available

- Integrations with other systems
- Additional data migration support
- Complex product requirements
- Multiple currencies or languages
- Complex sales process
- Dynamics 365 Sales Insights

Quotes available on request

Incremental Group

Incremental Group

Why choose Incremental Group?

2019/2020
INNERCIRCLE
for Microsoft Business Applications

Microsoft
Partner

Microsoft

Gold Enterprise Resource Planning
Gold Cloud Customer Relationship Management
Gold Application Development
Gold Cloud Productivity
Gold Cloud Platform
Gold ISV
Gold Data Centre
Gold Data Analytics
Silver Collaboration and Content
Silver Cloud Business Applications
Silver Small and Mid Market Cloud Solutions

Customers

WYNNSTAY

ARCHWOOD
GROUP

Willis
Towers
Watson

SWIRE

RIBBY HALL VILLAGE

HYMANS
ROBERTSON

AMI

WE DISCOVER, WE GROW
Girlguiding

M
MAZARS

Lloyd's
Register

ULTIMATE
FINANCE