



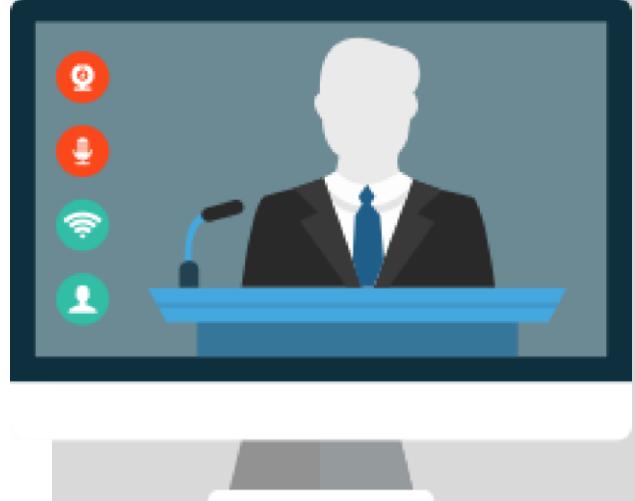
First of a Five-Part Webinar Series

Dynamics CRM Online Overview!

- Opportunity Management
- Mobile Productivity
- Business Insight

1:00 PM EDT
Friday | May 20, 2016

Presented by:



**Get To Know
Dynamics CRM Online!**



Deliver amazing Customer Experiences!

Reduce costs and increase profitability by organizing and automating business processes.

A portrait of a man with dark hair, wearing a dark suit jacket, a light-colored dress shirt, and a patterned tie. He is smiling and looking directly at the camera.

PRashant Rao (Marketing Manager, Computer Solutions East, Inc.)

A Technical Specialist in CRM Application Certified by Microsoft. A shrewd marketer that believes in the concept of tracking ROMI (Returns on Marketing Investments).

Loves Traveling, Cooking, Graphic Designing and of course his wife.



Delivering Amazing Customer Experiences since 2004

Implementing Microsoft Dynamics CRM for optimized sales, marketing, and customer service

Ian Smith (Owner and President, SyncraTec, Solutions LLC.)

Ian heads up SyncraTec Solutions, a Microsoft Dynamics CRM and Cloud Solutions Provider in the Greater Philadelphia Area. He is a Microsoft Certified Professional with an MBA from Rider University.

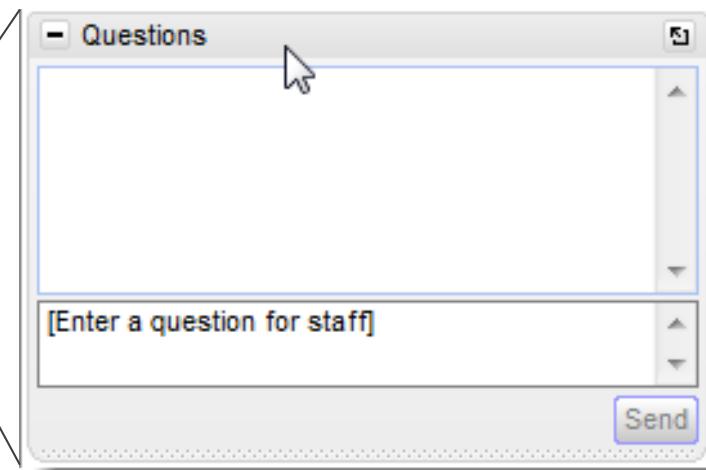
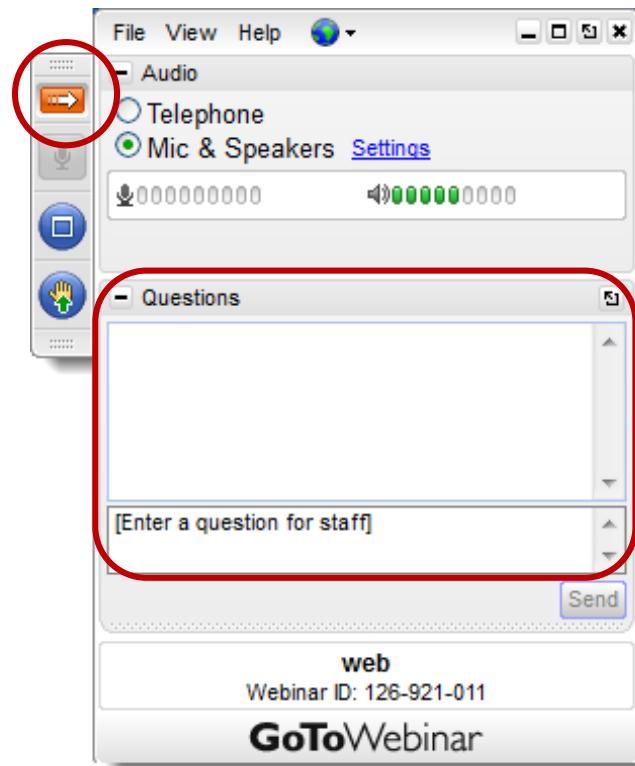
Lives in Yardley, PA where he enjoys family life with his wife and two sons; and running, basketball, soccer, and gardening.



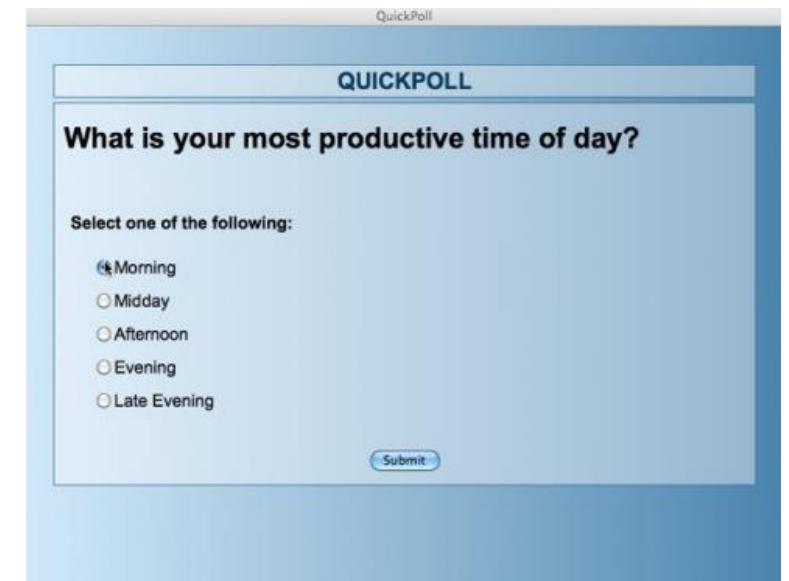
Agenda

- Make the most out of your Opportunities
- An Easy path to achieve CRM Excellence
- Value of Dynamics CRM
 - Opportunity Management
 - Mobile Productivity
 - Business Insight
- Summary
- Questions from the Audience
- Next Webinars





Ask your questions



Answer Quick-poll

Why should a smaller business care?

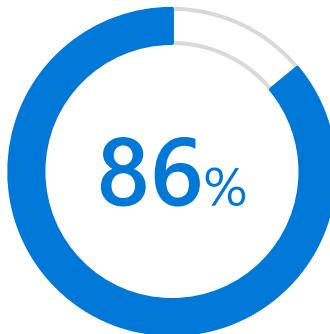
Because *customer experience* matters now more than ever

→ It's what differentiates you

→ It's how you win and keep customers

→ It's how you grow your business

...and in an increasingly connected world, your reputation is more important than ever.



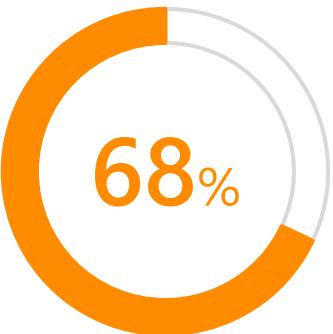
of consumers are willing to pay more for a better customer experience



of customers have left a brand due to bad customer service



of all internet users are now active on social media



of internet users trust consumer opinions posted online

If you're focused
on managing
opportunities
and creating
great customer
experiences...

...then you're really
talking about
CRM!





What if you could easily manage opportunities as an extension of familiar tools like Office 365?



Focus efforts on opportunities with the best immediate and long-term potential



Close sales faster with more efficient processes and more productive teams



Differentiate your business by delivering exceptional customer experiences

The screenshot shows a Microsoft Outlook interface integrated with Dynamics CRM. The top navigation bar includes 'Office 365' and 'Outlook'. The inbox shows several emails from contacts like Rene Valdes, Sidney Higa, Patrick Sands, Scott Konersmann, Rene Valdes again, and Paul Cannon. An email to Maria Campbell is selected, showing a 'Track' button. The right pane displays Dynamics CRM data for Maria Campbell, including her contact details (Contoso Ltd., CEO), past activities (Project Update Meeting on March 10 at 3:30 PM), upcoming activities (Finalize on Sales Order on March 29 at 10:30 AM), cases (Order Missing), and opportunities (Contoso needs 10 orders worth \$155,000.00).



Are we focusing
on the right
opportunities?

How can we
manage our sales
pipeline better?

Is everyone able to
access the same
customer history?

Who are our
most profitable
customers?

How can my sales
team work better
on the road?

Do I know my
customers better
than my
competitors do?

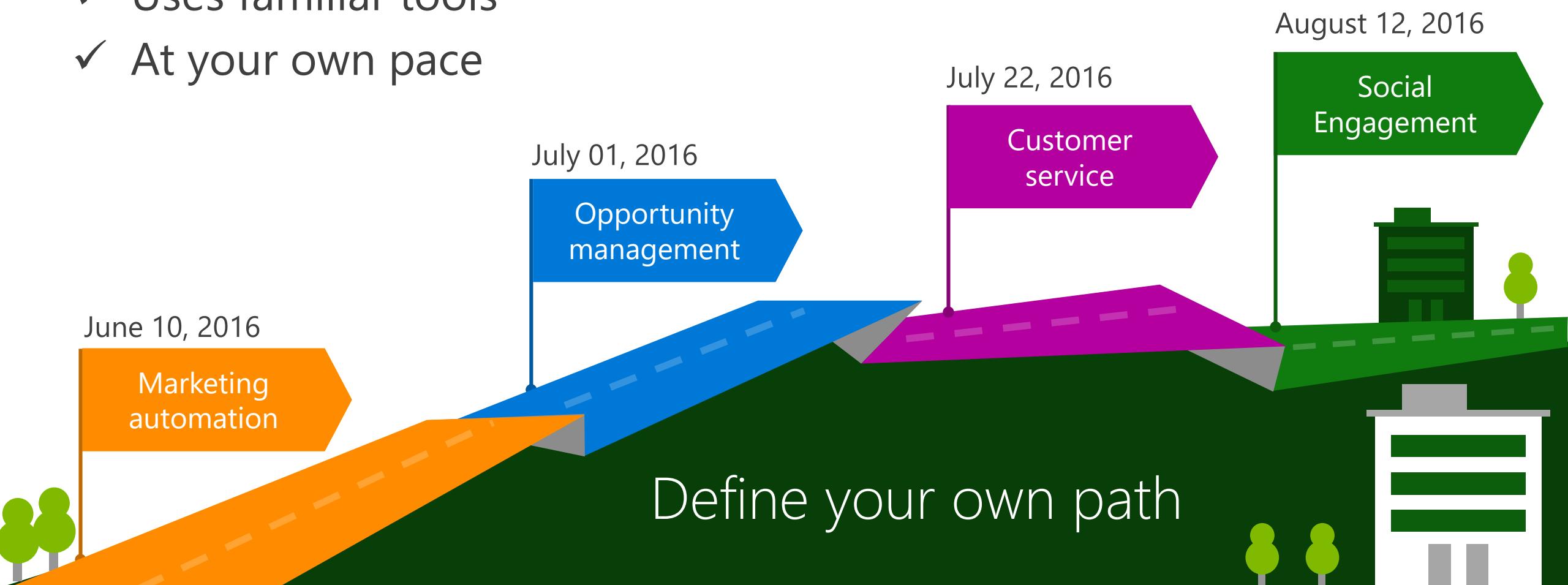
Where will the
next big
opportunity come
from?

Are you making the most
of your opportunities?



An easy path with Microsoft Dynamics CRM Online

- ✓ Easy for any size business
- ✓ Uses familiar tools
- ✓ At your own pace



The value of Dynamics CRM Online

Opportunity Management



Make it easy for *everyone* in your organization to get the information needed to deliver great customer experiences

Mobile Productivity



Empower your sales and service teams to do their best work from virtually anywhere on any device

Business Insight



Get visibility into your organization to make informed decisions and grow your business



Opportunity
Management

Challenge

Anyone talking to customers—whether salespeople, field support teams, or office staff—needs to have access to consistent, detailed knowledge of customer information and past interactions.

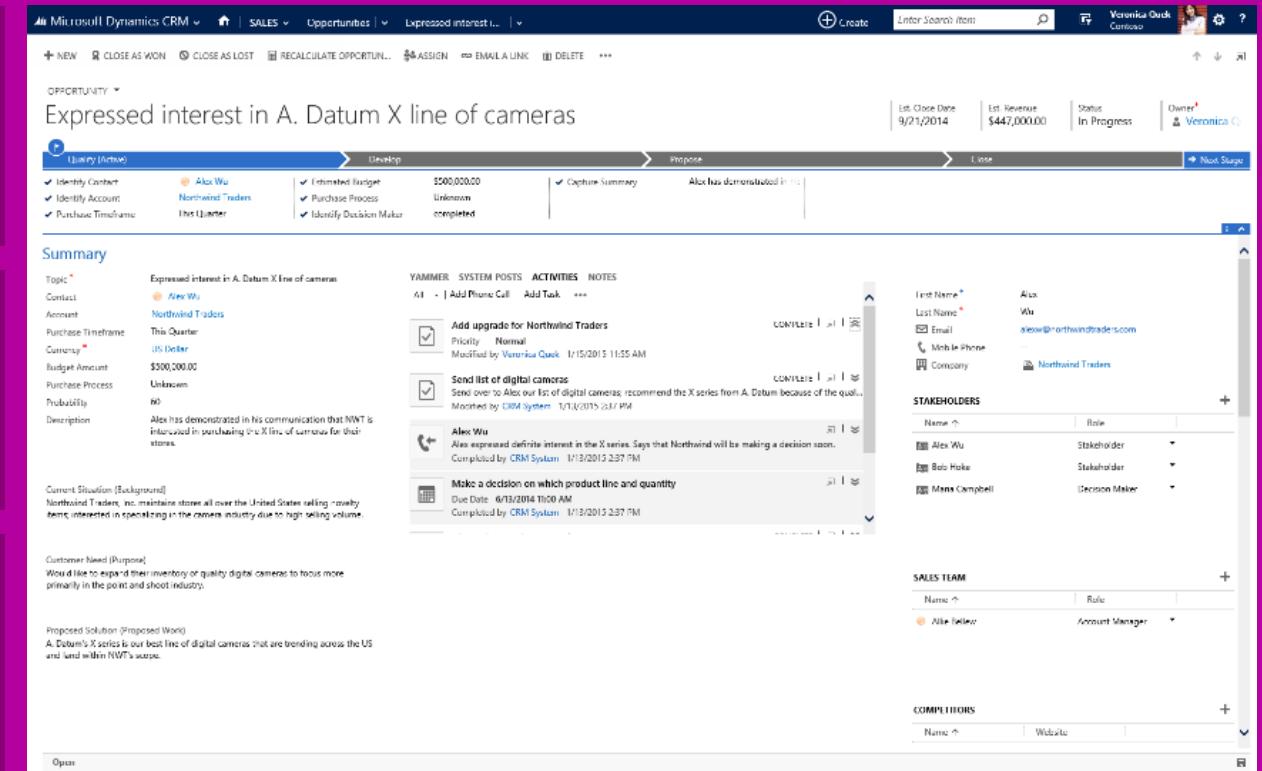
Solution:

Make it easy for everyone in your organization to access complete, consistent customer information.

Make information instantly available using tools your employees are already familiar with

Give employees a single, centralized source of the truth with all customer information in one place

Build trust with customers by delivering personalized experiences no matter who they talk to in your organization



The screenshot shows a Microsoft Dynamics CRM Opportunity record. The main title is "Expressed interest in A. Datum X line of cameras". The opportunity stage is "Propose". Key details include:

- Identity Contact:** Alex Wu, Northwind Traders, First Quarter
- Estimated Budget:** \$500,000.00
- Purchase Process:** Purchase Process
- Probability:** Unknown
- Description:** Alex has demonstrated interest in purchasing the X line of cameras for their stores.
- Customer Need (Purpose):** Would like to expand their inventory of quality digital cameras to focus more primarily in the point and shoot industry.
- Proposed Solution (Proposed Work):** A. Datum's X series is our best line of digital cameras that are trending across the US and within NWT's stores.

The right side of the screen displays various tabs and sections such as Summary, Yammer, System Posts, Activities, Notes, Stakeholders, Sales Team, and Competitors, showing interactions and tasks related to the opportunity.

Solution:

Make staying in touch with customers a seamless part of employees' day-to-day activities.



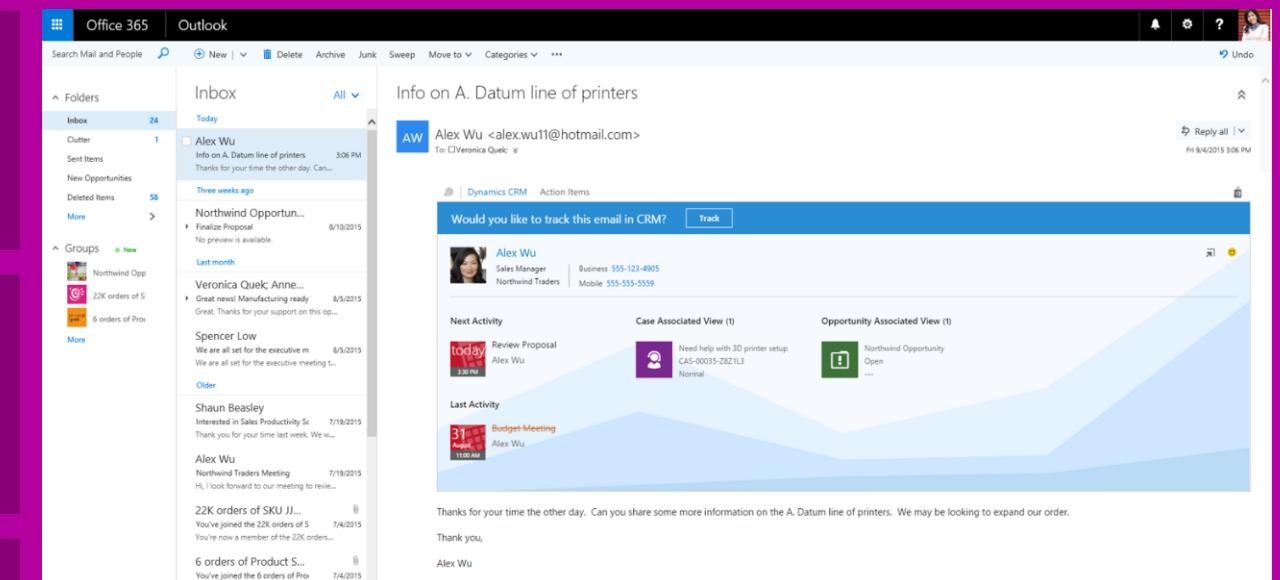
Review customer information, plan your day, and connect with your customers in a few clicks with CRM and Office 365



Use Outlook and Dynamics CRM together for scheduling, tracking, and emailing customers



Maximize opportunities by engaging customers in real-time with online meetings in Skype for Business





DEMO

Opportunity Management



Mobile Productivity

Challenge

The workforce is becoming increasingly mobile, with a need to be productive anywhere. Employees need tools that make it seamless to work across multiple locations, whether at the office, at home, or on the road.



Solution:

Let employees connect with customer information wherever they are, on whatever device.



Use CRM on mobile devices, so employees can get to customer info and act on it wherever they go



Enable sales reps to work seamlessly across their tablets and phones



Get up-to-date information wherever they're working





Solution:

Build winning teams by boosting productivity, freeing up more time to spend with customers.



Use consistent, streamlined processes that help employees be more productive



Automate repetitive tasks and spend more time helping customers



Onboard new staff and get them up to speed quickly and easily

The screenshot shows a Microsoft Dynamics CRM interface for an opportunity named "Tile roof design and installation". The top navigation bar includes links for Sales, Opportunities, and a search bar. Below the header, there are buttons for NEW, CLOSE AS WON, CLOSE AS LOST, RECALCULATE OPPORTUN..., ASSIGN, EMAIL A LINK, DELETE, and more. The main area displays the opportunity details: "Est. Close Date: 8/28/2015". The pipeline stage is currently "Qualify". The pipeline steps shown are: Qualify, Develop (Active), and Propose. Under "Qualify", tasks listed include: Identify Contact (checked), Identify Account (checked), and Purchase Timeframe (checked). Under "Develop (Active)", contact information is listed: Eva Corets, Fabrikam, Inc., and This Quarter. Under "Propose", tasks listed include: Estimated Budget (\$250,000.00), Purchase Process (Committee completed), and Identify Decision Maker (checked). A note on the right says "This is an op...".



DEMO

Mobile Productivity



Business Insight

Challenge

Business leaders need quick visibility into areas that require attention. They need to understand what is and isn't working, make decisions quickly, and take corrective actions to ensure they meet the goals of the business.



Solution:

Stay on target with real-time visibility into your business.



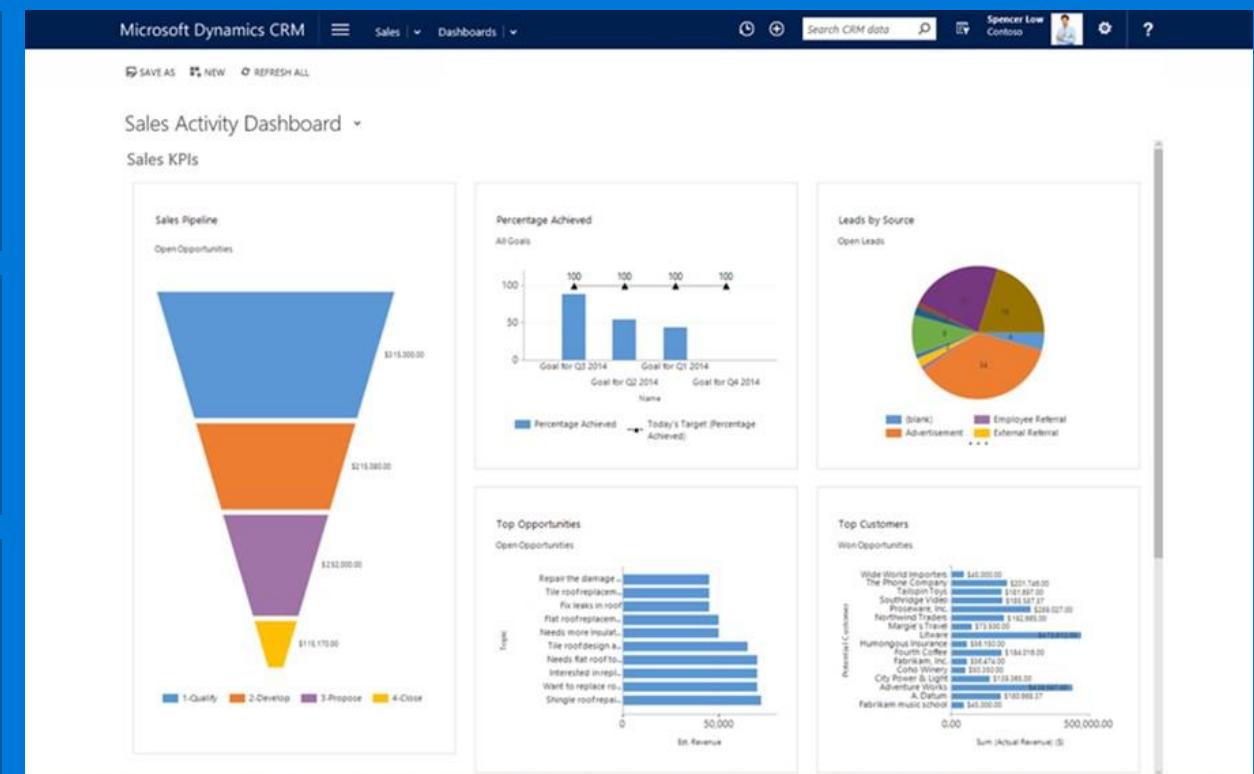
Use live dashboards and interactive reports that let you visualize how your business is doing



Identify and act on troubled areas, such as revising a campaign in poor-performing areas



Take corrective actions fast to optimize operations and ensure you're meeting revenue goals



Solution:

Uncover new opportunities and drive business growth with deeper insights.



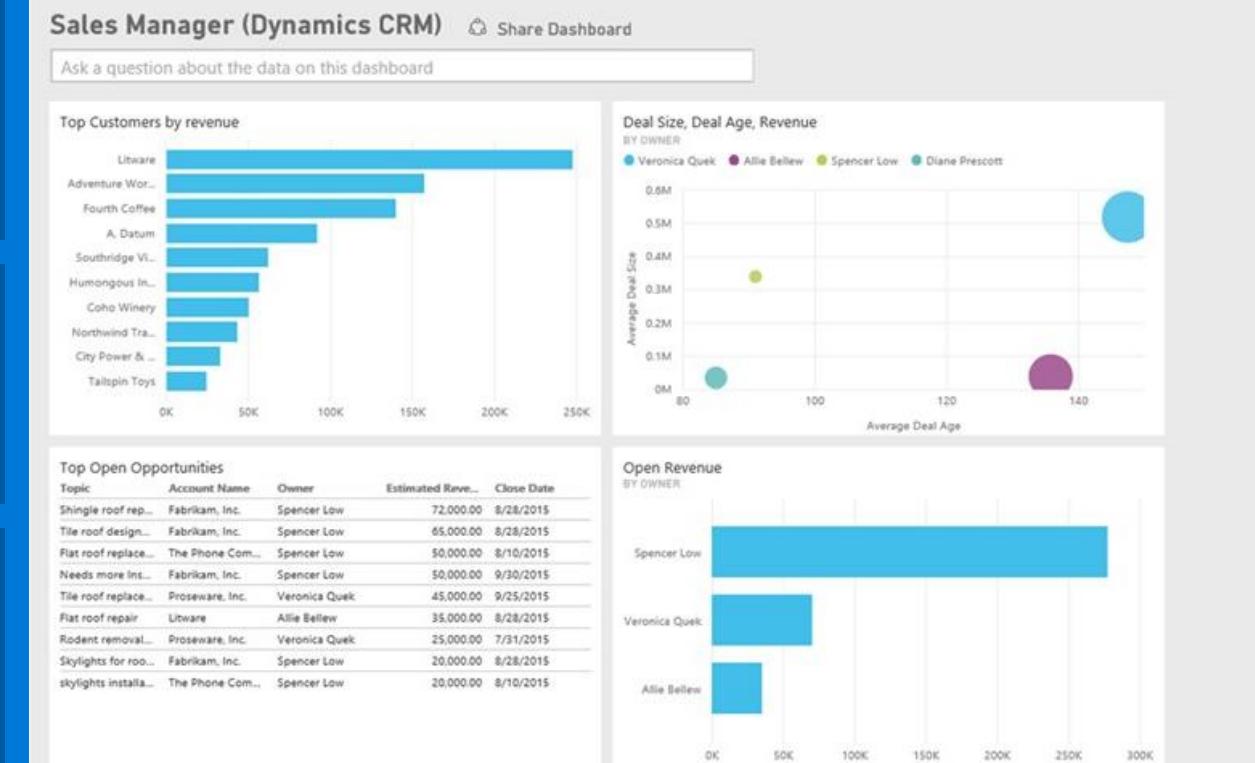
Reveal hidden opportunities with the ability to visualize new sales trends



Anticipate customer needs and sell them new products and services they are likely to purchase



Ensure your sales team is focused on opportunities that are most profitable—and most likely to close





DEMO

Business Insight

Adding value to your business with Microsoft



Opportunity Management

Access complete, consistent customer information
Stay in touch with customers



Mobile Productivity

Give employees access anywhere on any device
Free up more time to spend with customers



Business Insight

Get real-time visibility into your business
Uncover new opportunities



Microsoft Dynamics CRM Online

A breadth of tools. An affordable price. At your pace.



Opportunity
Management/Sales



Customer Care/Service



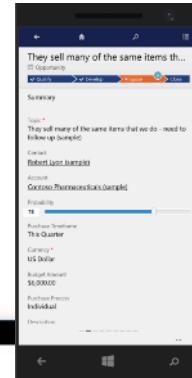
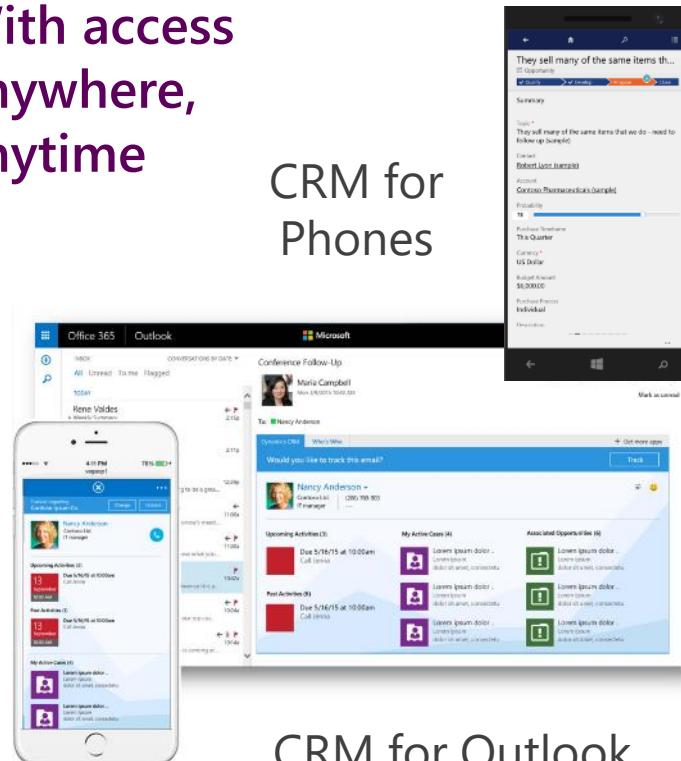
Marketing Automation



Social Media Insight

With access
anywhere,
anytime

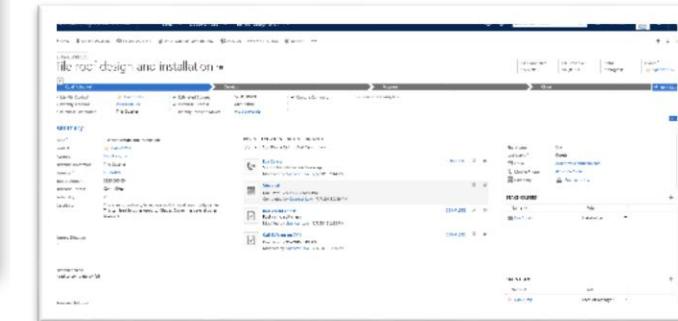
CRM for
Phones



CRM for Tablets



CRM for Outlook



Traditional Web access

Dynamics CRM Online and Office 365

A comprehensive solution



Get CRM that works seamlessly with familiar tools, like Outlook and Excel



Access customer history, set up meetings, and connect with anyone in a few clicks



Rely on an affordable enterprise-class cloud infrastructure from Microsoft

Microsoft
Dynamics CRM



Office 365

3 reasons to get started now



1

It's easier than you think. Employees catch on quickly with easy, familiar tools.

2

It's affordable. It's managed for you in the cloud, without capital expense for servers and software.

3

It's time. Realize gains quickly in productivity, sales effectiveness, and customer service excellence.

Next Steps | Contact us



Computer Solutions East
Business Technology Simplified

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Get to Know
Marketing Automation
with CRM Online

*Friday, June 10, 2016
at 01:00 PM EDT*

[Click Here to Register](#)



Webinar 3:
Get to Know
Sales Automation
for CRM Online

*Friday, July 1, 2016
at 01:00 PM EDT*

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Webinar 4:
Get to Know
Customer Service
with CRM Online

*Friday, July 22, 2016
at 01:00 PM EDT*

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Webinar 5:
Get to Know
Social Engagement
with CRM Online

*Friday, August 12, 2016
at 01:00 PM EDT*

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