

WD

24



Transforming Customer Relationships

Jay Fitzhenry & Peter Norman

Transformation Specialists

Agenda

- **What is a CRM?**
- **Why might you need one?**
- **Product showcase**

What is a CRM?



Customers

Who are you working with?

Relationship

How and why do they engage?

Management

How do we support engagement?

Why might you need one?



OPERATIONAL EFFICIENCY

Business Processes
Native BC Integration
Real-Time Analytics
Scalable Solutions



COST REDUCTION

Cloud-Based
Resource Management
Reduce IT Overhead
Reduce Partner Reliance

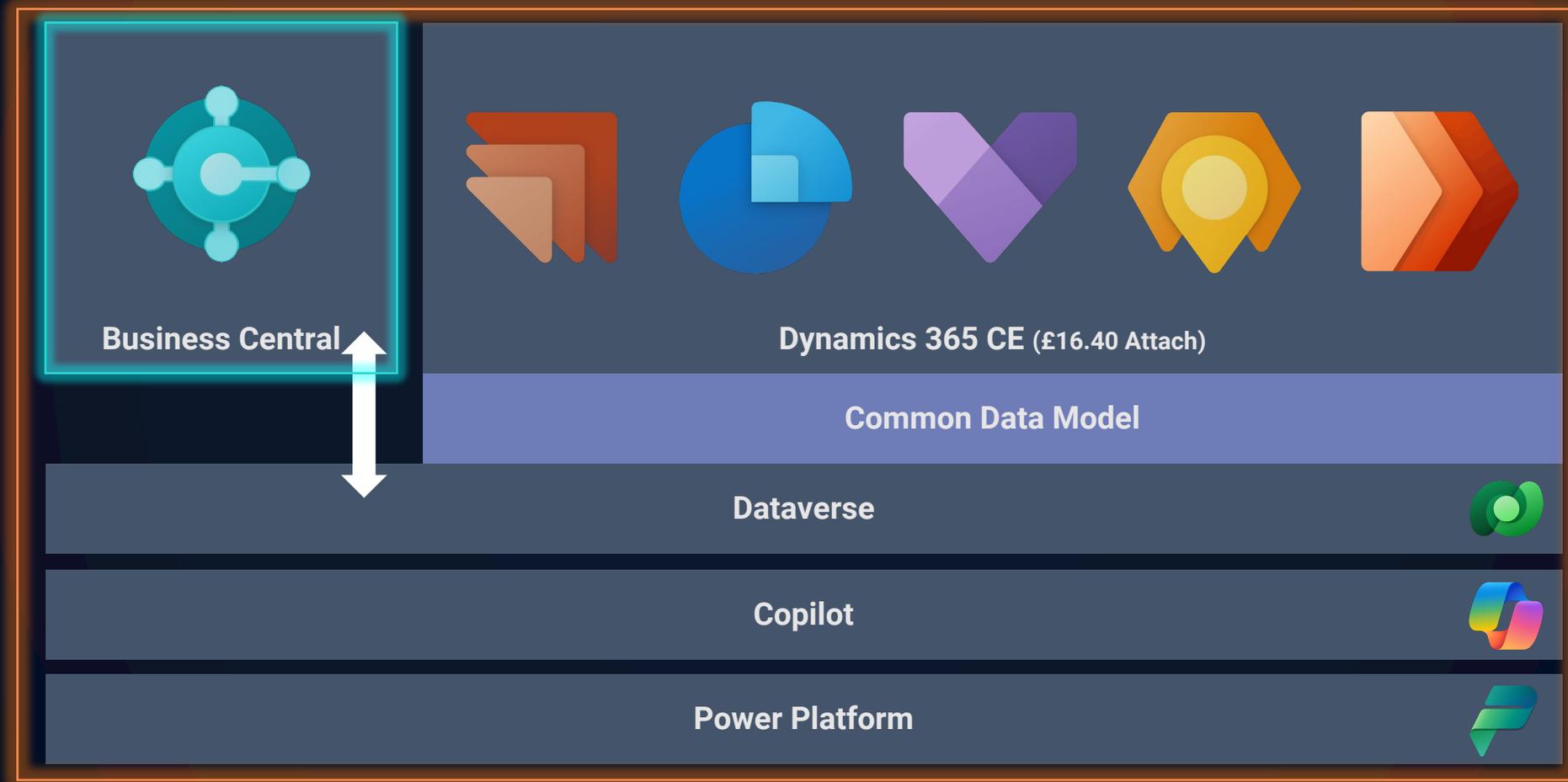


CUSTOMER ENGAGEMENT

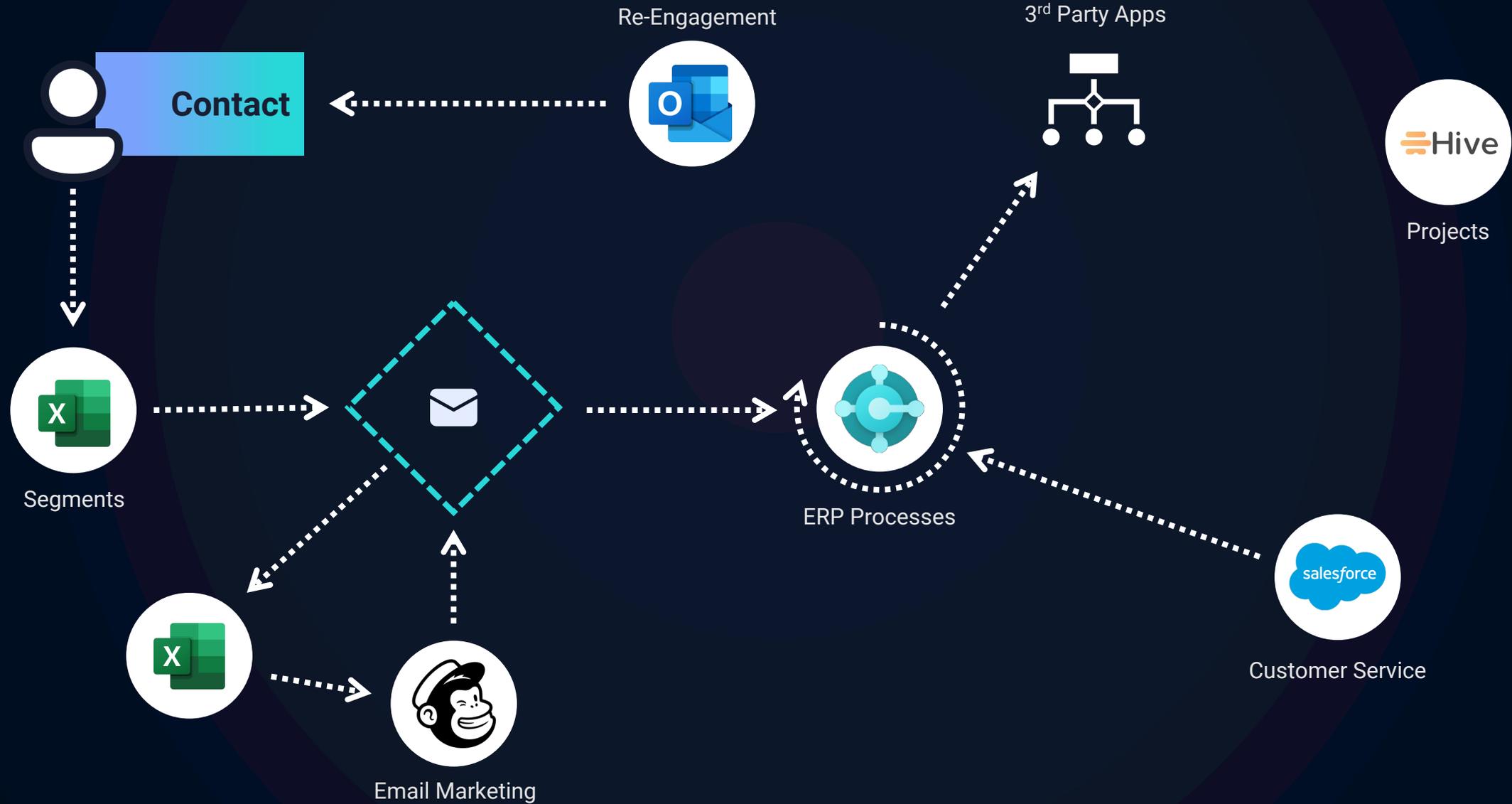
Personalised Experience
Omnichannel Support
Customer Insights
Automated Journeys

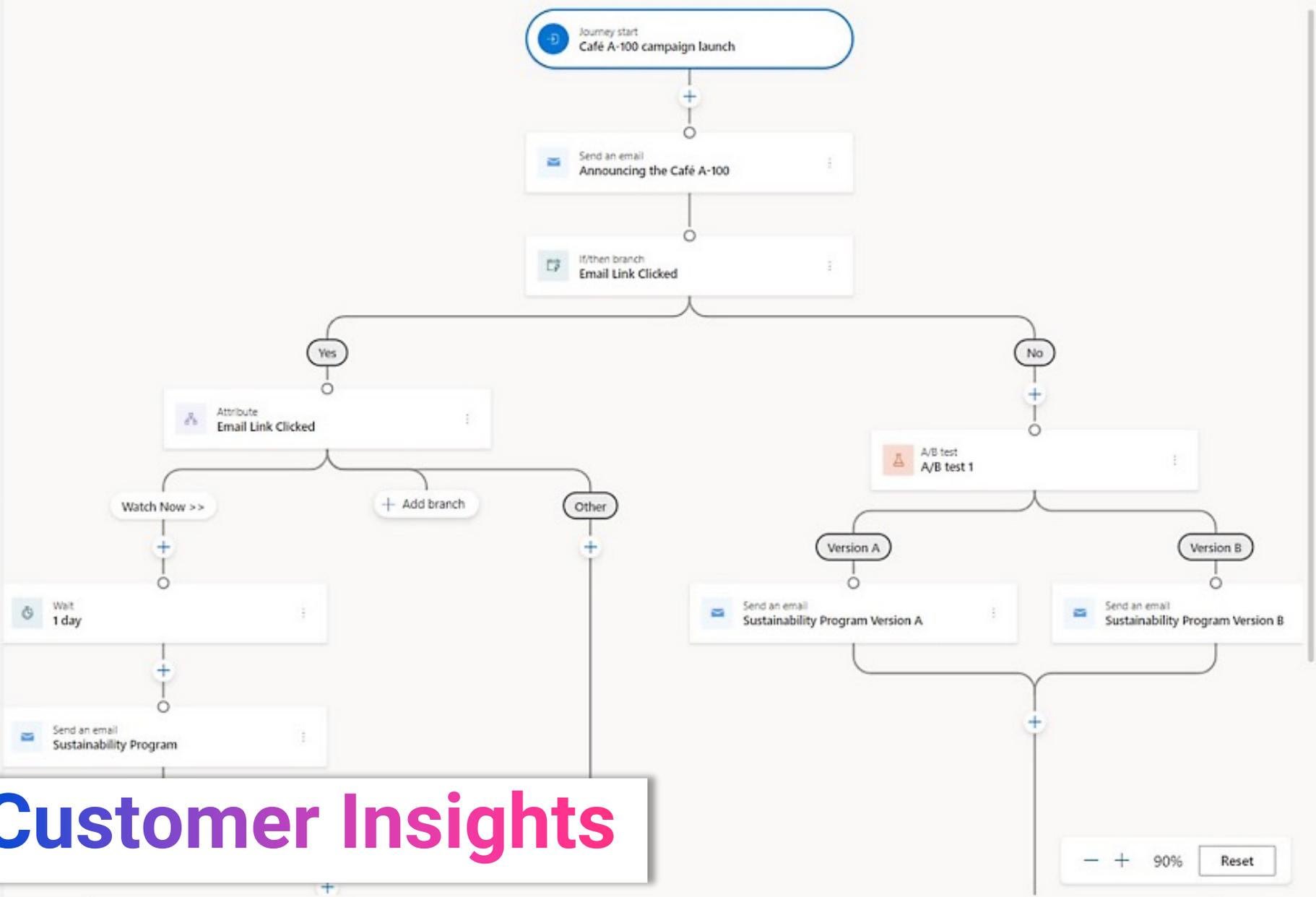
And why now?

NODE4



Core CRM





Entry

Audience

Select a segment *
Café A-100 campaign launch
Audience: Lead

Select the frequency

- A one-time journey with a static audience
- A one-time journey where newly added audience members can start any time
- A repeating journey where all audience members repeat the journey every:

1 days

Exclude by segments

People in a selected segment can't participate in the journey. You can select multiple segments.

Schedule

Time zone

Set the time zone for the journey. [Reset](#)

(GMT-08:00) Pacific Time (US & Canada)

Start *

Mon, Jul 3, 2023 12:00 AM

End

Mon, Jul 31, 2023 12:00 AM

90% [Reset](#)

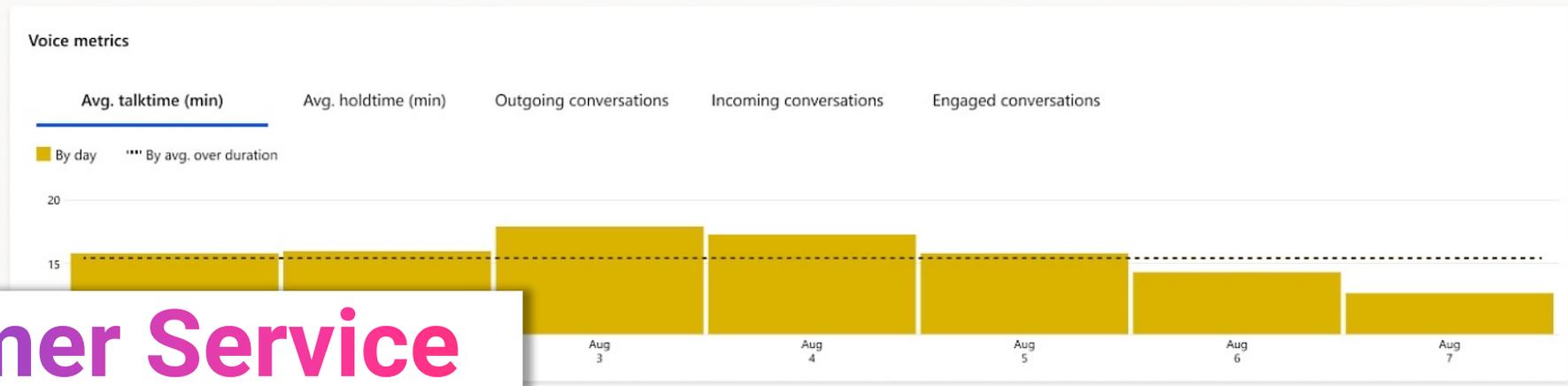
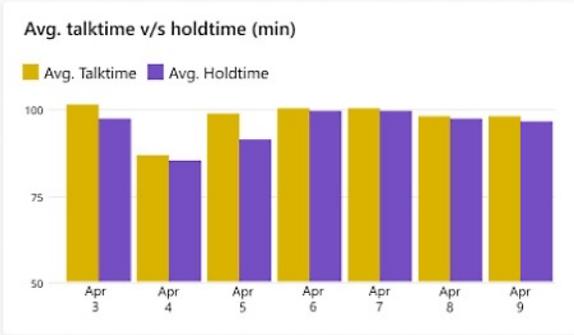
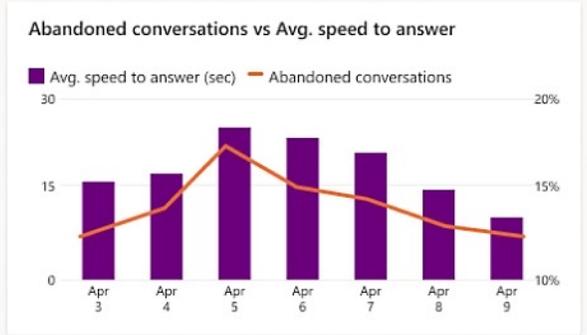
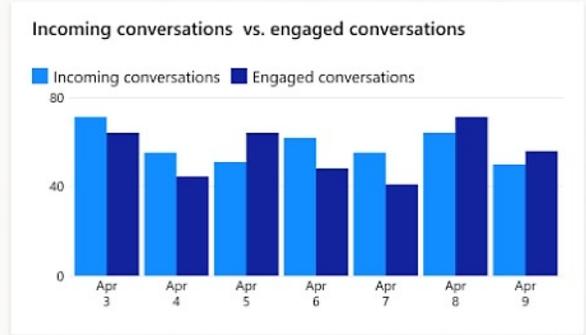
Customer Insights

Summary | Ongoing conversation | **Agents** | Voice

Pause updates | Last updated 7/14/2022 5:08: 15 PM

Duration: Last | 7 | Days
 Queue: All
 Agent: All
 Conversation status: All
 Timezone: UTC

04/01/2024 - 04/07/2024



Customer Service

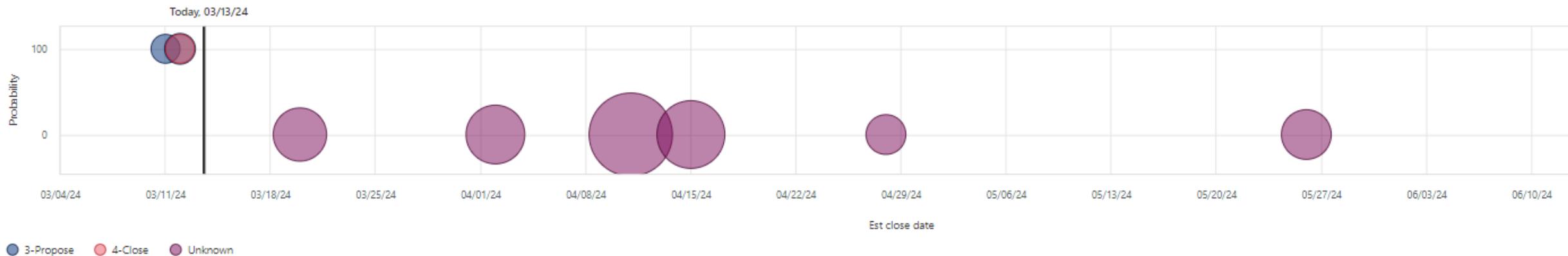
Agent conversation style

All Opportunities

Edit columns Edit filters

Pipeline value **£43,050.00** Number of deals in pipeline **113** Won amount **£386.40** Number of won deals **4** Lost amount **N/A** Number of lost deals **1**

Deal tracker Sales funnel



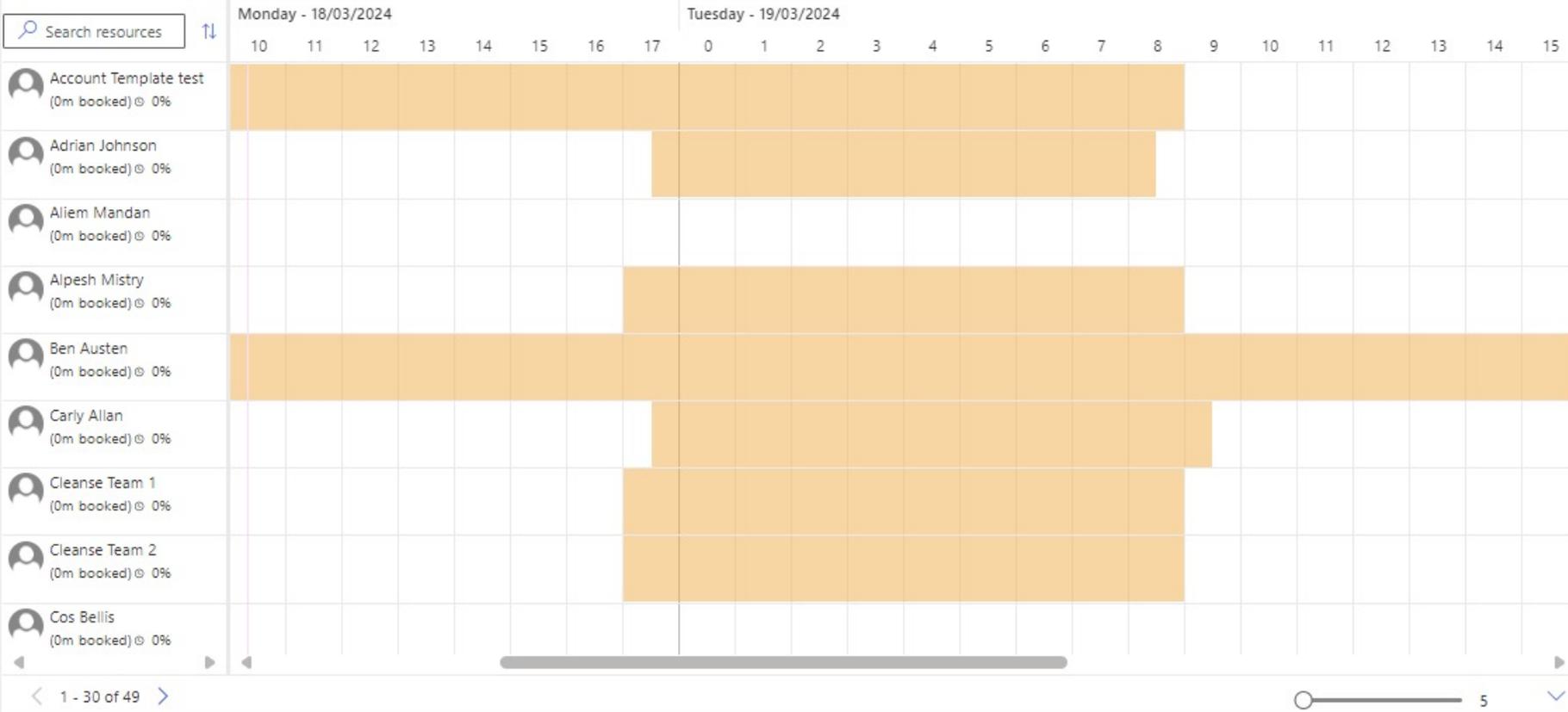
Topic*	Potential Customer*	Email Address	Status*	Actual Close Date	Actual Revenue	Est. close date	Est. revenue	Rating
			Open			12/1/2025	£0.00	Warm
Black Friday Sale	Harmony Home Furnishing		Open				£0.00	Warm
Black Friday Sale	The Cannon Group		Open				£0.00	Warm
Black Friday Sale	Tom Bevan		Open				£0.00	Warm
Bunny Product	Bizz Procurement Solutions		Open					Warm
Contacts that prefer Rum	Alchemy Drinks Wholesale		Open				£0.00	Warm
Contacts that prefer Rum	Alchemy Drinks Wholesale		Open				£0.00	Warm
um	Costco Wholesale UK Ltd		Open				£0.00	Warm
um	Costco Wholesale UK Ltd		Open				£0.00	Warm
Contacts who prefer Brandy/Conqac	The Cannon Group		Open				£0.00	Warm

Sales

- Home
- Recent
- Pinned
- My Work
- Dashboards
- Get Started
- Scheduling
- Work Orders
- Schedule Board
- Bookings
- Resource Require...
- Requirement Grou...
- Time Off Requests
- Time Entries
- Customers
- Accounts
- Contacts
- Service Delivery
- Cases
- Agreements
- Insurance
- Warranties

Initial public view : RSO : +

Filters Hourly Gantt 18/03/2024 - 20/03/2024 Book



Details



No item selected
Select an item to view details.

Unscheduled Service Activities Open Requirements Project Unscheduled Work Orders

Service Activity (Resource Requirement)	Service (Service Activity)	Duration (Resource Requirement)	Status (Service Activity)	Created By (Service Activity)
- Aircraft Clean	Aircraft Clean		Open	Peter Norman
- Aircraft Clean	Aircraft Clean		Open	Peter Norman
	Aircraft Clean		Open	Peter Norman

Field Service

- Home
- Recent
- Pinned
- My Work
 - Dashboards
 - Time Entries
 - Expenses
 - Material Usage
 - Approvals
 - Activities
- Projects
 - Projects
 - Program
 - Schedule Board
 - Resource Utilization
 - Resources
 - Contract Workers
 - Roles

← Save Save & Close + New Project Copy Project Budget Deactivate Book Delete Share

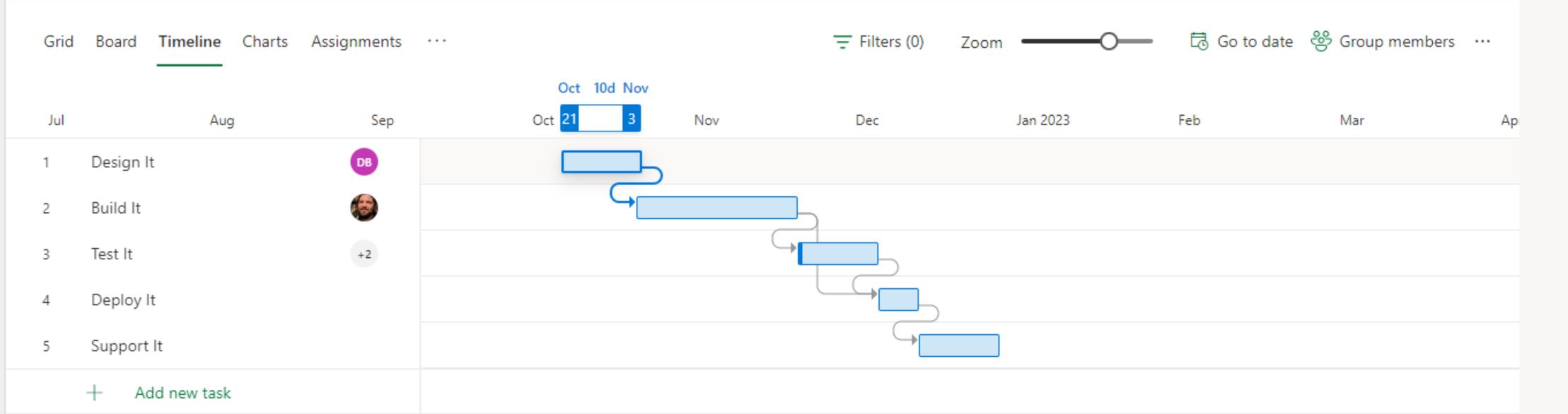
Bo Jangles Project - Saved 1/4/2023 5:00 PM 0.80 **Peter Norman** (1) Proposed

Project Due Date Progress % Project Manager State

Project Service - Project ... Active for 17 months

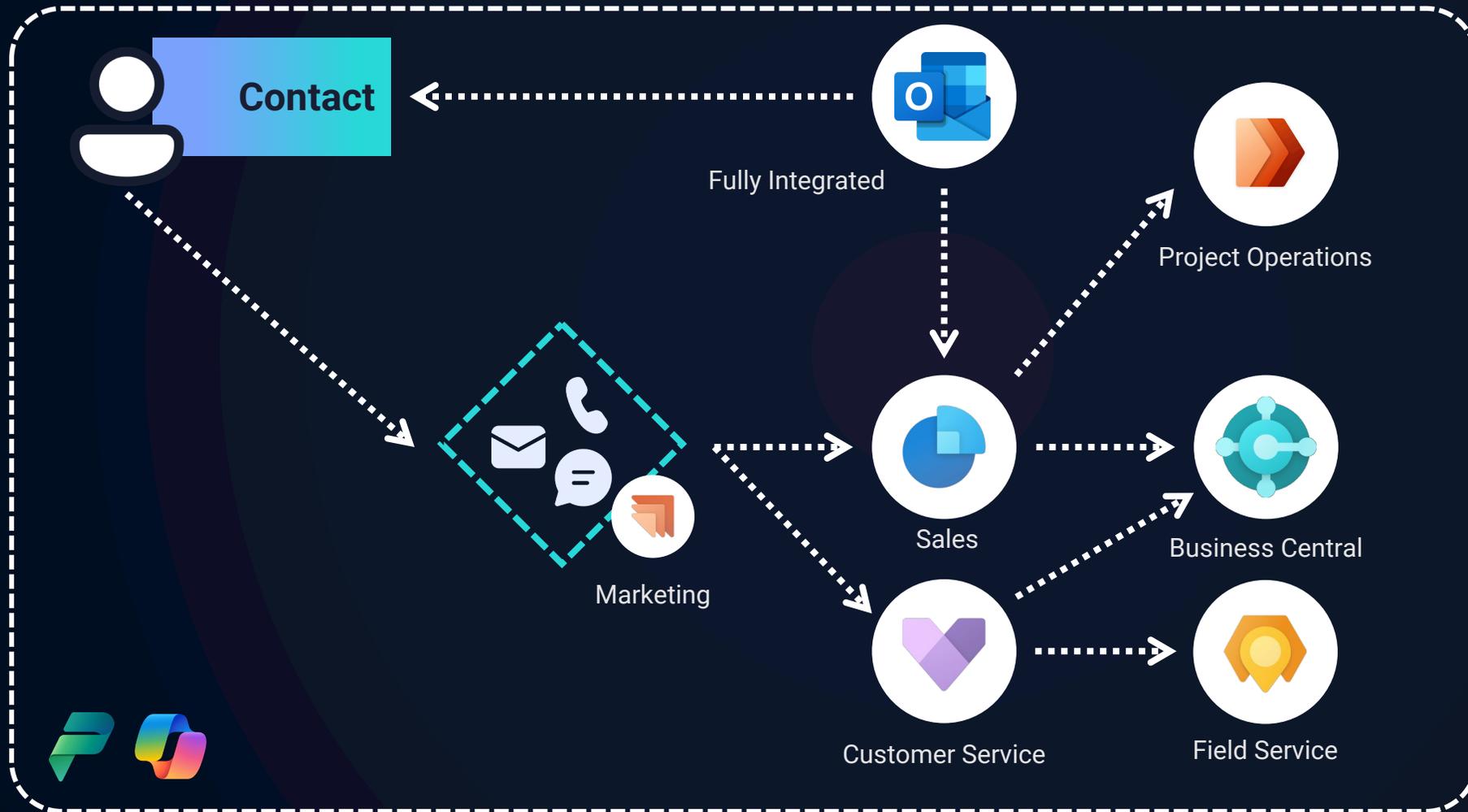
New (17 Mo) Quote Plan Deliver Complete

- Summary Business case Financials Resources Resource Assignments **Tasks** Risks Issues Changes Deliver Opportunities Status ...

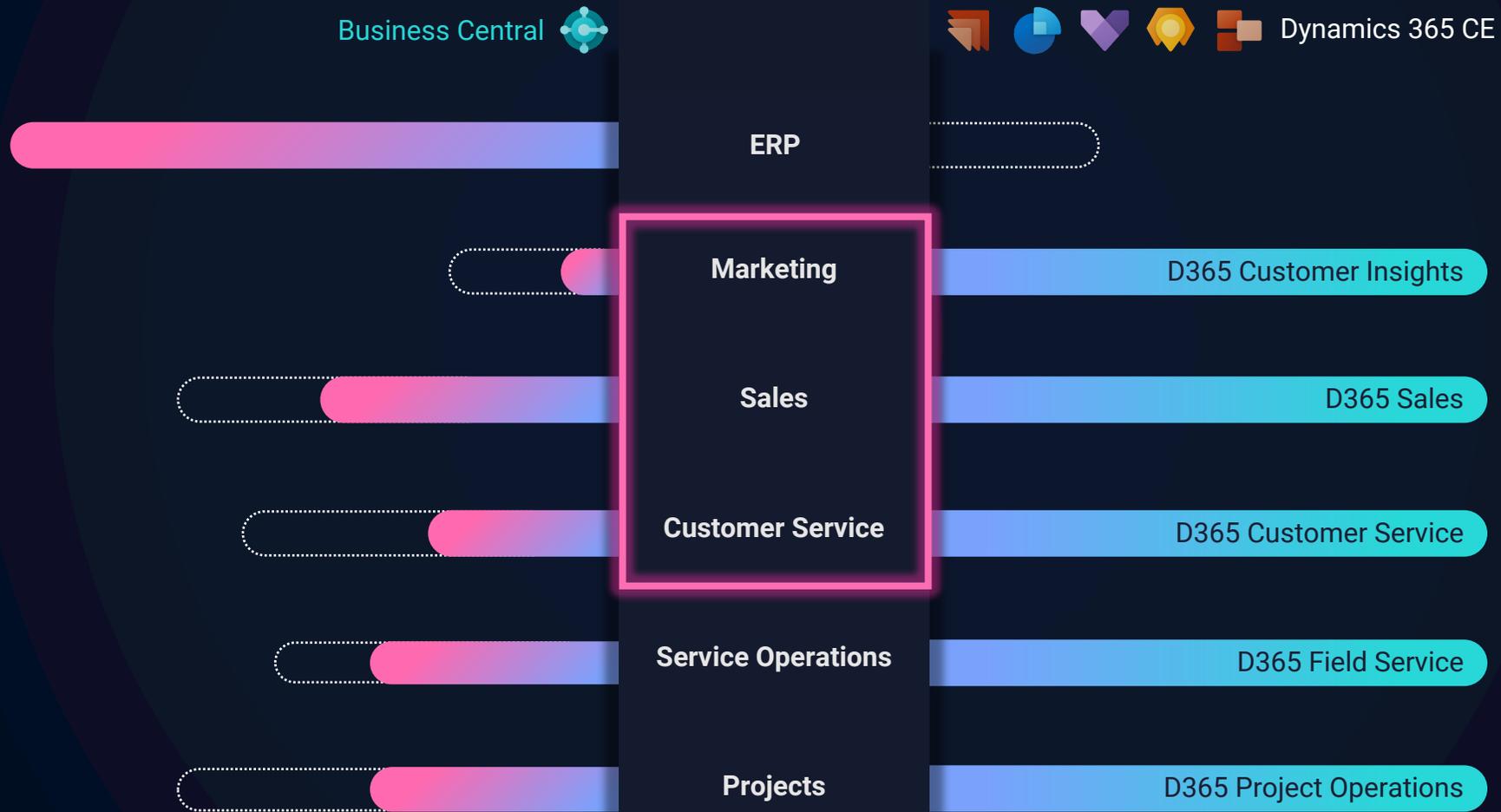


Project Operations

Core CRM



CRM Product Comparison



Product Demo

Walk through Dynamics 365
and get started on your CRM
journey!



Come and talk!

