

CRM is a strategy system put in place for a company to track all clients and potential clients. Cloud9 Insight implements Dynamics 365 on the cloud to ensure a safe and secure CRM system.



What is Microsoft Dynamics 365?

Dynamics 365 offers a single view across your business, joining your data, processes and relationships to deliver further insights into your business.

Why would SMBs invest in Cloud CRM?



Company does not want to be dependent on internal IT department or 3rd party IT support.

Realisation that when the company grows there is a need to ensure consistency of customer experience and of process and compliance.

Manage customer service.

Solution supports relationship management, communications and compliance as well enhancing customer experience.

Company moves offices and is not sure the old server can take it

Realise that when the company grows they need to ensure consistency of customer experience and of process and compliance.

Ability to nurture needs and automate marketing communications and generate leads.

Pipeline and opportunity management, and forecasting



Deployed CRM 5 years (content management) and it's not supporting the process, is not flexible and is not supporting the business growth.

Reporting needs as there is currently no visibility of what the business development is or insight (no 360 view of the business and channels).

Lead to cash process needs to be visible.

Scheduling and resource management

Got any more questions?

Can I have a demo? Call us on 01273 921510



At Cloud9 Insight, we offer two options for CRM implementation - Fast Track and Strategic - dependant on the time frame, budget and requirements for the CRM.

Fast Track CRM

An agile, light-phased approach to deploying the software for a set of core users within a particular line of business such as **sales, marketing** or **service**.



- Fast Deployment (30 day delivery from requirements to training)
- Perfect for small teams with one core business process (Sales or Service)
- Ideal for a working proof of concept



- 1 day on-site training
- Knowledge transfer to help you be self-sufficient
- Ongoing support and training contracts available



- Best practice advice about sales, marketing and service processes to ensure the highest ROI.
- Offers the functionality to support your business process

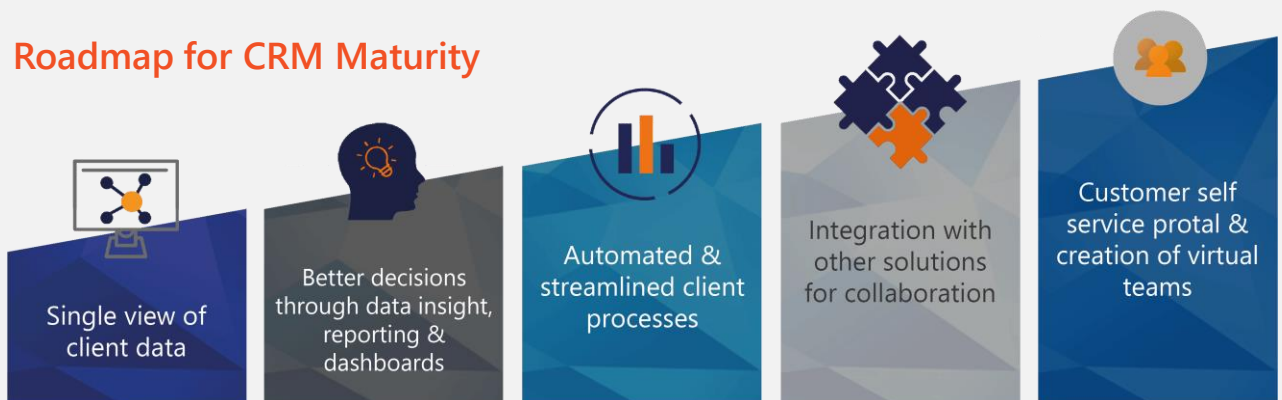


- Fixed, low budget phase 1
- Flexible licence and support agreements offered on a monthly rolling contract

Strategic CRM

Build a vision for using CRM, and other cloud solutions in the business, aligning and supporting a business in delivering its strategy. It creates a critical momentum for change and a cohesive pull by all stakeholders to achieve any desired business transformation.

Roadmap for CRM Maturity



Get in contact with the Cloud9 team to figure out the best solution