



Dynamics 365 Implementation Package



At Avrion, our Dynamics 365 implementation package is straightforward and designed to make your life easier.

Dynamics 365 Sales Quick Start Assist is a great place to get started with your CRM. A guided and hands-on service to create a solution that is right for your business and ready to use. This involves setting up the system using the out-of-the-box components and features of whichever CRM application you choose - Dynamics 365 **Sales Professional** or **Sales Enterprise**.

We're there for you every step of the way.

You'll be able to implement your CRM immediately with experience-based advice from Avrion, your Technology Partner.

Our first job is to get your CRM up and running quickly, with the benefit of our team's many years of experience. With this implementation package we promise exceptional value for money because we're there to make sure you get it right.

There is no finite "finish" point with CRM and digital transformation. With Avrion as your Technology Partner, you get to enjoy a relationship that continuously delivers value.



Why choose Avrion?

Microsoft is a well-recognised global brand with a substantial customer base, and is demonstrably good value in the CRM and ERP market place. Dynamics 365 is family of next-generation applications that work standalone or integrated, helping customers to conquer existing and emerging business challenges. With a company like Avrion alongside you, that value is significantly increased, with experience that money can't buy. **You won't find such a value for money proposition anywhere else, guaranteed.**

Once the system is ready to go, the value does not end there. From our ongoing support to helping you evolve your business, we offer a wide range of technologies that help you to integrate, streamline, automate and innovate the way you work.

Efficiency all in one place

This bundling of our services ensures you, as the customer, will be acquiring the whole package in a way that you can make the most of the CRM software quickly, with user adoption as a priority.

Your CRM implementation can be achieved in a time-efficient way with best practice guaranteed, with the comfort of an experienced team. **You won't get a better CRM package.**

A PROPERLY IMPLEMENTED CRM
SOLUTION CAN YIELD AN ROI OF

45% PER POUND
INVESTED

READWRITE



1 Onboarding consultation session:

Initial meeting - to identify how you plan to use the system and your specific requirements, enabling us to understand how best to implement and configure your system, knowing which modules need to be configured and to what level.

2 Setting up and configuration of the system:

One-2-one sessions - jointly reviewing the principles of the chosen modules and then configuring these. This covers:

- › *The foundation modules, e.g. Accounts, Contacts, Activities, Announcements, Calendars, Quick Campaigns.
- › Configuration of the core & advanced across all foundation modules such as custom fields, views and layouts, workflow Actions and Activity feeds, reports.
- › Setting up global system options, user accounts and permissions.
- › Outlook App setup and configuration.

Presentation session(s) - demonstrating the configured system as a proof of concept.

- › Opportunity to improve configuration ready for Go Live.
- › Engaging the end users, securing their buy-in to your solution.
- › *Optional modules to add to the above, with price added for each item chosen from the following: Leads, Opportunities, Cases, Orders & Invoices, Products.

For the **Sales Enterprise application, additional modules include:*

- › *Foundation modules: e.g. Forecasting, Sales Goals, Literature, Business Units, Teams, Territories.*
- › *Optional modules: e.g. Email Engagement, Conversion Intelligence, Sales Accelerator, Lead & Opportunity Scoring, Knowledgebase.*

3 Knowledge and skills transfer training for administrators:

Training session - to cover system management and administration for up to 3 people. Data Import and Marketing module options can be added.

Our Implementation package aims to:

- › Guarantee your system is configured specifically for your business from the outset.
- › Empower you with the skills needed to manage and administer your CRM system going forward.
- › Give users the knowledge and confidence to use your system to a high standard, aligned with your business processes.

Our package gives you:

- › A proven way to implement CRM successfully and at the lowest price point possible.
- › The quickest route to a fully configured system
- › A flexible package that can be tailored for your business — we'll work out the most cost effective licencing package for you.
- › Full system control with fast track administrator knowledge transfer.
- › Fast user adoption with process driven user training.

Delivered by Avrion, a proven CRM implementor, ensuring value for money with faster ROI

4 User Training:

Group training session - this package includes half a day for either Basic or Advanced Training per group for up to 5 users. Training sessions are tailored to suit your business and users.

5 Follow-up Training:

A webinar session - for all users, completed several weeks after Go Live. Good for a recap once users start using the system and a chance to learn more advanced features.

**Interested in Quick Start Assist?
Contact us to find out more!**

SALES TEAMS THAT USE ADVANCED CRM FEATURES SUCH AS AUTOMATION SEE A

10%

SALES UPLIFT POTENTIAL

MCKINSEY & COMPANY

Dynamics 365 Implementation Package	Quick Start Assist
<p>Deliver in</p> <p>Onboarding consultation session — planning for success</p> <p>Setting up the Dynamics 365 licences and environment</p> <p>Professional system configuration</p> <p>Proof of concept and user buy-in session(s)</p> <p>User training (5 delegates per session)</p> <p>Knowledge and skills transfer training for administrators</p> <p>Post training support webinar</p> <p>Complimentary new starter training for additional user licences added in first 12 months</p> <p>Flexible pricing — tailor package to only pay for the modules you use</p> <p>Data import assistance</p> <p>Package delivered remotely with on-site sessions if required</p> <p>In-product customisation service (optional)</p> <p>Add other Dynamics 365 applications as part of this solution (optional)</p>	<p>2-8 weeks</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>



Microsoft Dynamics 365
Sales



Microsoft Dynamics 365
Field Service



Microsoft Dynamics 365
Customer Service



Microsoft Dynamics 365
Marketing



Microsoft Dynamics 365
Power Automate



Microsoft Dynamics 365
Power BI



Microsoft Dynamics 365
PowerApps

Exceptional value: we have substantially reduced our standard rates for these packages.