Agile CRM Analytics

Microsoft Dynamics 365

A turnkey reporting solution based on Microsoft Power BI that integrates with your Dynamics 365 data

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Who

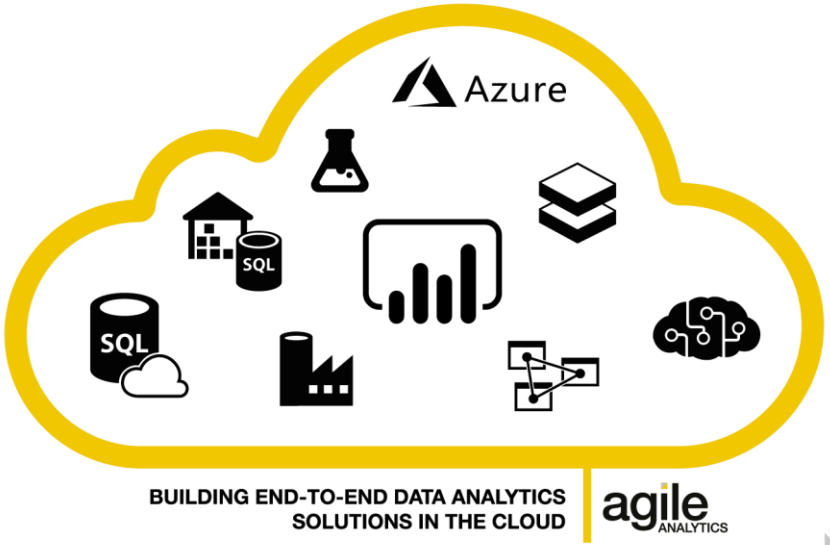
We enable organizations become data-driven

Agile Analytics is a boutique consulting firm based in Australia and a Microsoft Gold Partner in Data Analytics.

We consult, design, and deliver tailored data analytics solutions to mid-to-large size organizations in Australia and Globally.

*Our mission is to help organisations build a **data-driven culture, to gain and sustain competitive advantage** in today's market.*

*We do this by **combining data analytics** and **machine learning, leveraging cutting-edge Microsoft cloud technology.***



CRN FAST50 2020 #8

Microsoft Partner
Microsoft
Gold Data Analytics
Gold Data Platform

What

We deliver end-to-end BI & data analytics solutions

Data Management

We design, build and maintain your organization's data estate

Business Intelligence

We deliver business-focused solutions to enable data-driven decisions

Advanced Analytics

We help you transform your data into intelligent insights

Why

We build solutions that drive business value

End-to-End Solutions

We deliver end-to-end innovative data solutions that are **tailored** specifically to your needs, **deployed fast**, and done in a **fraction of the cost**.

Business-Driven Solutions

We can take your business to the next level by embedding the information into your processes so it is right where decision makers need it.

Extensive Expertise

We are thought-leaders and experienced practitioners in Data Analytics space. Our team are **fully qualified professionals**, with deep industry expertise who **focus on business outcomes** not just technology.

AGILE PACKAGED SOLUTIONS

Customizable pre-built dashboards

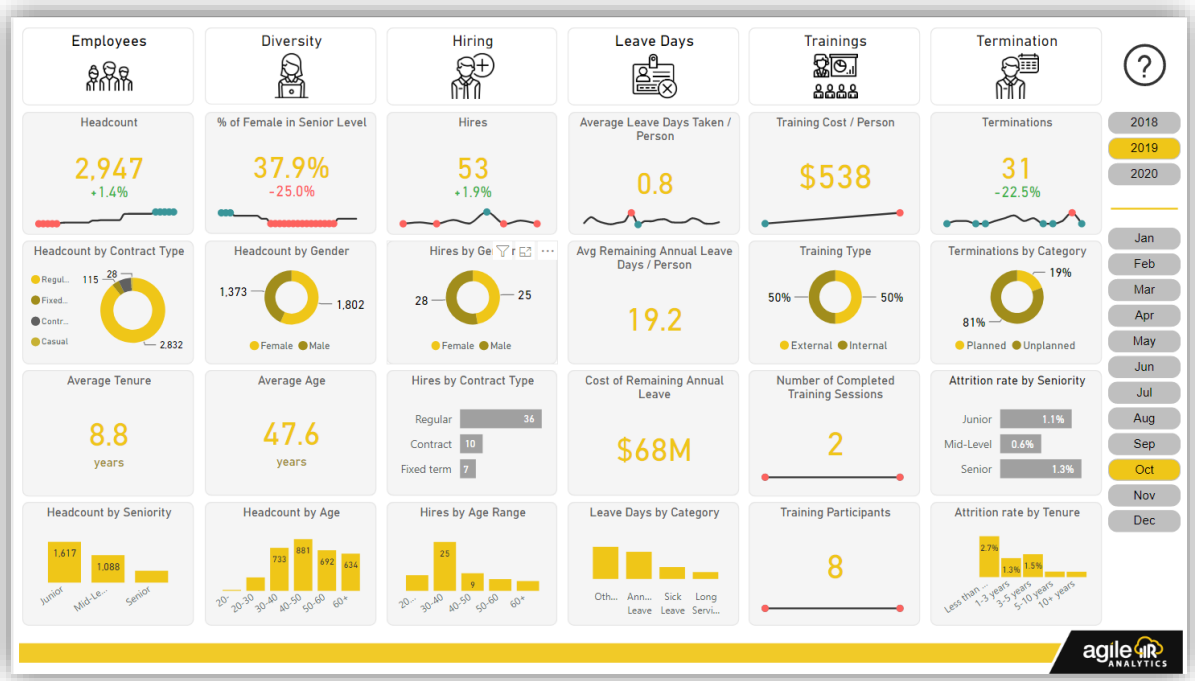
Dashboards are up and running within days, providing immediate business value.

Accelerating Time-to-Insights

WITH OUR POWER BI SOLUTIONS

Solutions by Business Function

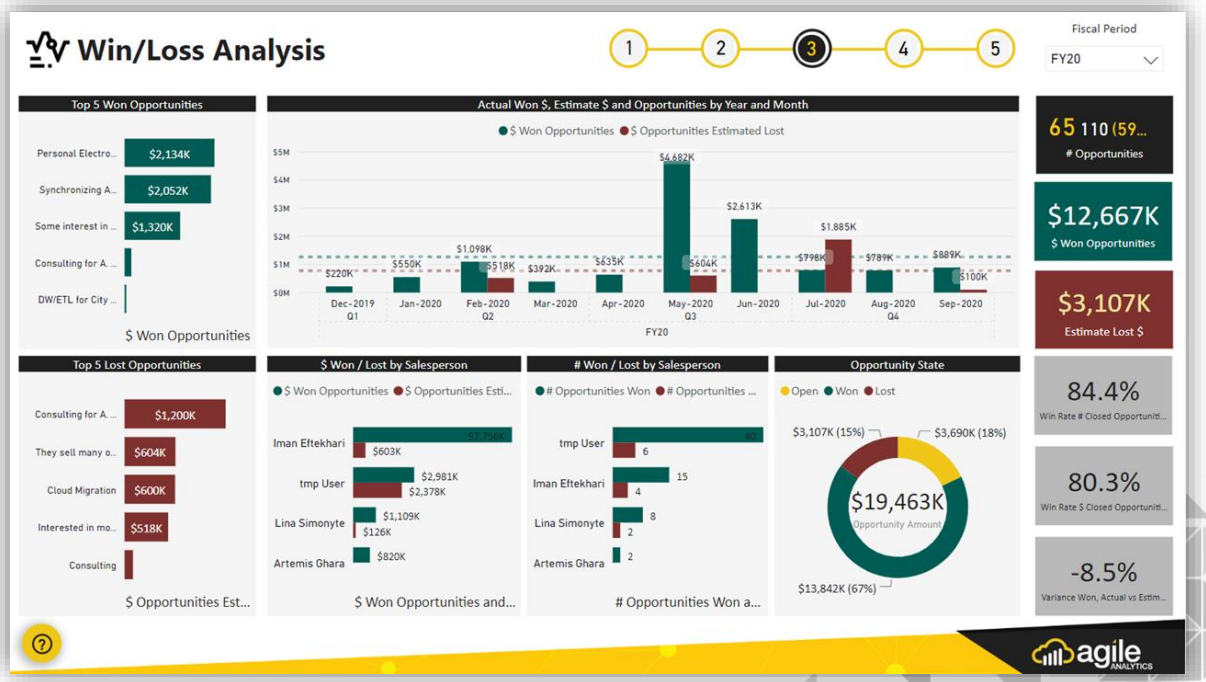
HR Analytics



Understand your diversity, **workforce performance, leave liability, training effectiveness, and many more!**

More details and demo video are here.
Get it from AppSource

CRM Analytics

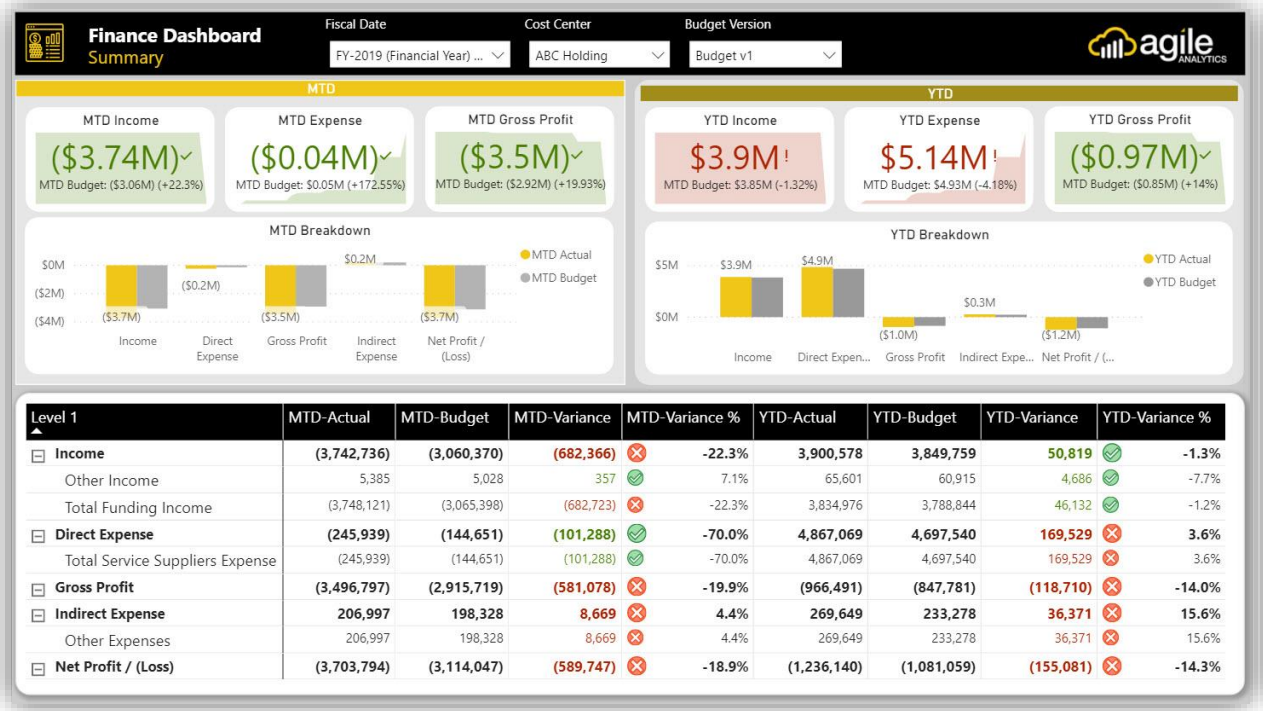


Our CRM Analytics solution is used for effective analysis of marketing and sales performance from your Dynamics 365 CRM.

See the working demo in here
Get it from AppSource

Solutions by Business Function

Financial Analytics

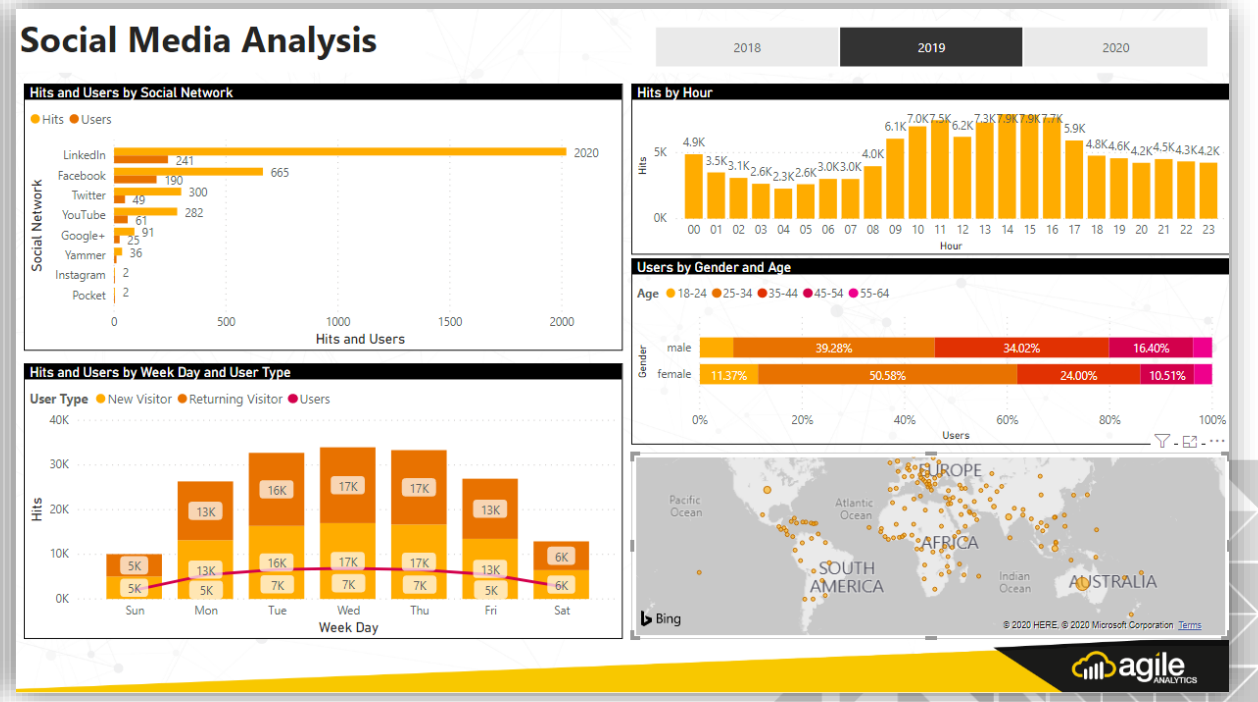


Level 1	MTD-Actual	MTD-Budget	MTD-Variance	MTD-Variance %	YTD-Actual	YTD-Budget	YTD-Variance	YTD-Variance %
Income	**(3,742,736)**	**(3,060,370)**	**(682,366)**	**-22.3%**	**3,900,578**	**3,849,759**	**50,819**	**-1.3%**
Other Income	5,385	5,028	357	7.1%	65,601	60,915	4,686	-7.7%
Total Funding Income	(3,748,121)	(3,065,398)	(682,723)	-22.3%	3,834,976	3,788,844	46,132	-1.2%
Direct Expense	**(245,939)**	**(144,651)**	**(101,288)**	**-70.0%**	**4,867,069**	**4,697,540**	**169,529**	**3.6%**
Total Service Suppliers Expense	(245,939)	(144,651)	(101,288)	-70.0%	4,867,069	4,697,540	169,529	3.6%
Gross Profit	**(3,496,797)**	**(2,915,719)**	**(581,078)**	**-19.9%**	**(966,491)**	**(847,781)**	**(118,710)**	**-14.0%**
Indirect Expense	**206,997**	**198,328**	**8,669**	**4.4%**	**269,649**	**233,278**	**36,371**	**15.6%**
Other Expenses	206,997	198,328	8,669	4.4%	269,649	233,278	36,371	15.6%
Net Profit / (Loss)	**(3,703,794)**	**(3,114,047)**	**(589,747)**	**-18.9%**	**(1,236,140)**	**(1,081,059)**	**(155,081)**	**-14.3%**

Stay in control of your **Profit & Loss,** track your **actual** numbers against **Budget / Forecast, drill-down** to **GL account level, ...**

See the demo

Marketing Analytics



Gain insight into your customers through **Social Media, EDM, leads source, segmentation** and **analysis of campaigns' ROI.**

See the demo

What Our Clients Say

Agile Analytics deployed their Retail solution with fraction of the cost compared to other available custom-built solutions. We were able to see the dashboards and our business performance within days!

Outstanding value and service, highly recommended!

- IT Manager, a retail corporation

Agile CRM Analytics

WHY, HOW, WHAT

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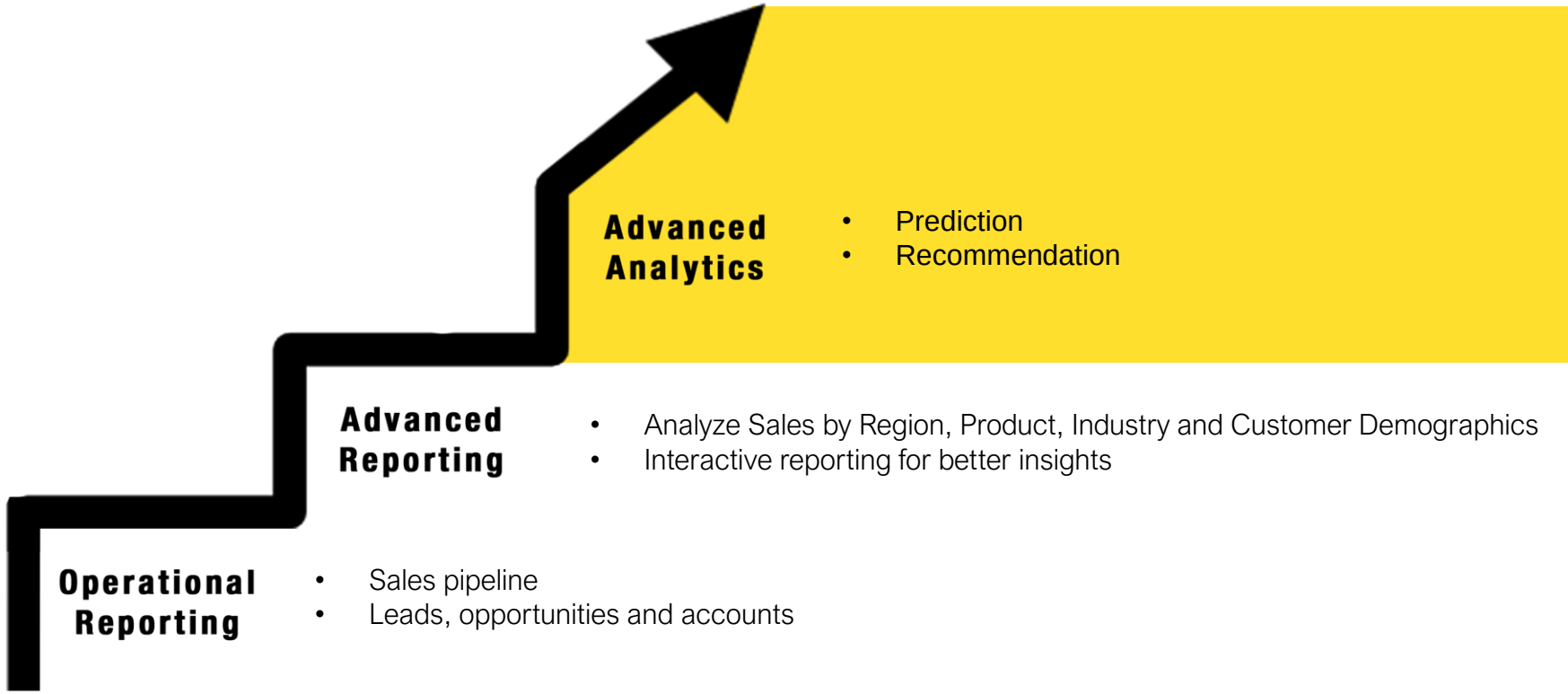
Take Your CRM Data Further

From Operational Reporting to Advanced Analytics

Microsoft Power BI



Why Agile CRM Analytics?

No More Complexity!

Gaining insights from Dynamics 365 data is normally a long and complex process

Security

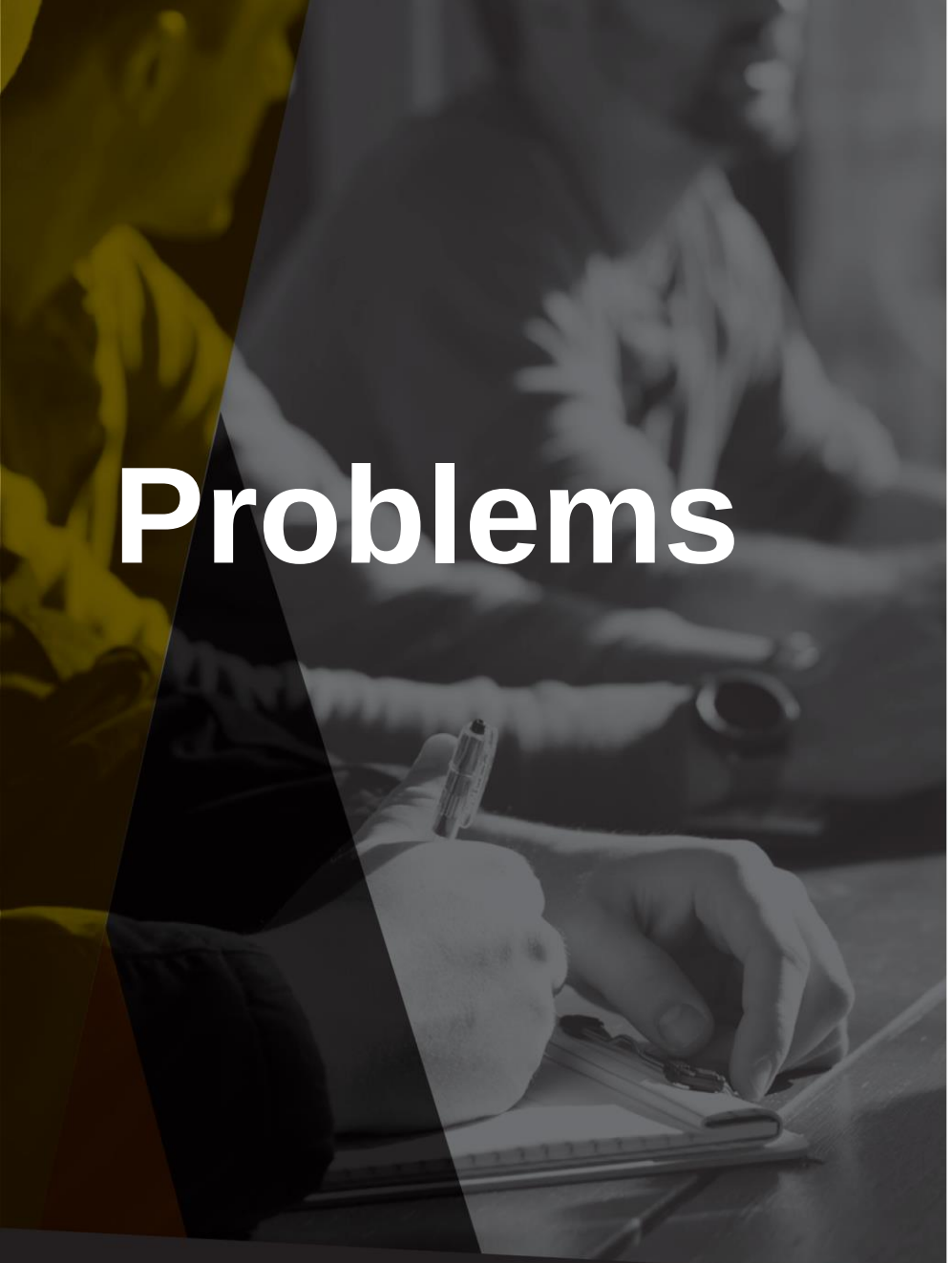
Securing the integrity and confidentiality of data is crucial

Visibility

Built-in reports lack a holistic view of the entire customer journey

Transparency

Managing customers without leveraging data is a difficult, tedious, and opaque process



Problems

Common **Challenges** with **D-365 reports**

- **Struggling** to find useful insights for strategic decision making.
- **Integration** with other systems is not easy.
- **Lack** of visibility of the **full customer's journey** in one place.
- **Difficulty** with reporting functionalities such as **grouping** or merging data groups.
- Managing and customizing dashboards often **needs IT support**.

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Solution

Agile CRM Analytics

Your **CRM** data in **Microsoft Power BI**

- **Single reporting environment:** All your data in one place
- **Multiple data sources:** Data, from all sources, in one view
- **Fully cloud-based:** No need for new, on-premises software
- **Flexible security:** Customize what each user can see
- **Tailored to your organization's needs:** See sales processes and customized fields according to your requirements

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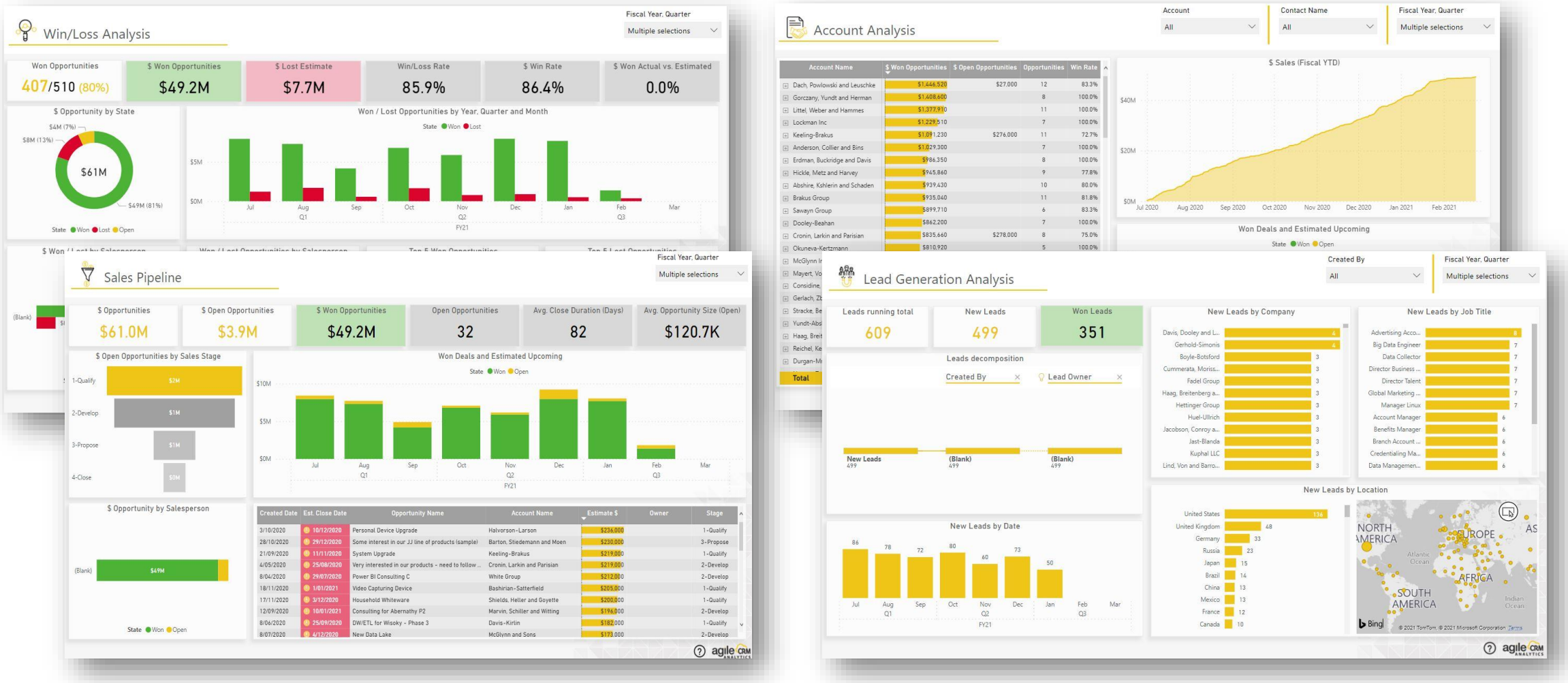
Agile CRM Analytics for Dynamics 365

A fully developed CRM Analytics solution, to enable you make data-driven decisions



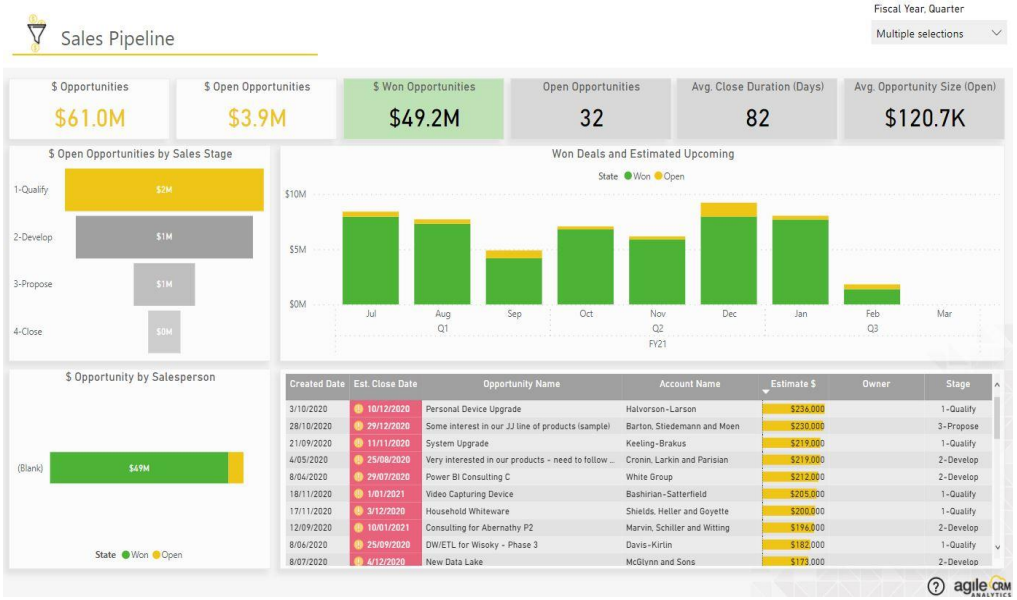
https://appsource.microsoft.com/en-us/product/power-bi/agile_analytics.dynamics365-power-bi-crm-reports

Microsoft Power BI: an Interactive Reporting Solution

Microsoft Power BI is a self-service business intelligence and reporting tool.

It’s a drag-and-drop interface where you can pull in already existing as data from multiple sources into the visualization of your choice.

We make analyzing your CRM data easy. By connecting your Microsoft Dynamics 365 data with our fully developed CRM Analytics Solution, you can hit the ground running!



Make Data-Driven Decisions

Leads Analysis

Gain valuable insights on your marketing performance

Sales Performance

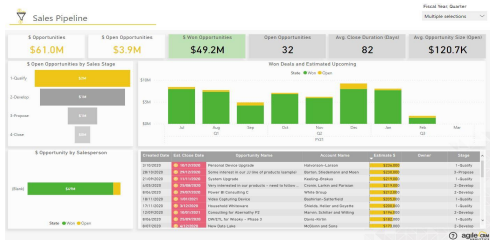
Are your sales team members performing according to their targets?

Win/Loss Analysis

Analyze the win rate, top wins and see it by sales reps and accounts.

Sales Pipeline

Gain valuable insights on your sales pipeline.



Business Value

Agile CRM Analytics

Simple and Effective

- **Minimal IT configuration:** quick and easy set up
- **Immediate value:** see your CRM data with few clicks
- **Fully cloud-based:** no need for new software or platform
- **Fast and easy to deploy and use:** one-click deployment, intuitive and easy to use
- **Subscription model:** simple and reasonable subscription plan
- **View all your CRM data** in one place, from any device, anywhere!

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Integration with Dynamics 365

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Dynamics 365 Integration

- Dynamics 365 API
- One click installation

Licensing

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Licensing Options

Quick-start
Power BI App

~~$250~~ $200
/month (billed annually)

- One click installation
- API connection to your Dynamics 365 CE
- Including 8 interactive reports
- Change to the existing reports or create new ones
- Unlimited users

Self-service
Get the Power BI file and DIY

$300
/month (billed annually)

- Save 100's of hours in development time
- Get the PBIX file and take control of the rest
- Built-in connectivity to Dynamics 365 CE
- Customize and create new reports
- Add your own logo and branding
- 12 months product support

Full Solution
We build & customise it for you

$400
/month (billed annually) *starting price

- Full package including the existing reports
- Customizing reports based on your needs
- Security set up and configuration
- API connection to your Dynamics 365
- Including your sales process and targets
- Your logo and branding
- 12 months product support

Contact us for a free quote

SEE YOUR CRM DATA IN ACTION!

Contact us for a demo / free consultation

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