



Membership CRM - **Fast Track**

Powered by Dynamics 365

For membership bodies looking to hit the ground running with a simple CRM. Fast Track is a fixed-budget and quick way to implement Dynamics 365 Sales or Service with some simple configurations to align the solution to your business, designed to be a first step of your CRM journey.

Why Dynamics?

- ✓ Enjoy a single view of your member data
- ✓ Marketing automation including renewals
- ✓ Member satisfaction surveys
- ✓ Track communications and activities
- ✓ Event management
- ✓ Live dashboards



“As a membership association, CRM is central to what we do – it’s our main business tool. I don’t know how we would have coped working from home without our Dynamics 365 system.”

Jeff Alexander, CEO
Gatwick Diamond

Your Package Includes

Sales

Quick start with Dynamics 365
for Membership

From **£5,500** + VAT

Service

Quick start with Dynamics 365
for Membership

From **£5,500** + VAT

| Fast Track, enables: | Sales | Service |
|--|-------|---------|
| Member, account and contact management | ✓ | ✓ |
| Lead and opportunity management | ✓ | |
| Activity management | ✓ | ✓ |
| Communication tracking | ✓ | ✓ |
| Case and ticket management | | ✓ |
| Data import from your spreadsheets | ✓ | ✓ |
| Simple dashboards and reporting | ✓ | ✓ |
| Web based training (2 hours) | ✓ | ✓ |
| 3 months of enhanced support | ✓ | ✓ |

Unsure which plan is best for you?
We are here to help.

[Book a Call](#)

Expand Your System With Our Additional Packs

These additional packs can be combined with the Fast Track for Sales or Service to create a custom implementation to fit your business needs.

| | | |
|--|--|--|
| <p>Service + SLAs</p> <p>SLA & contract management</p> <p>From £1,300 +VAT</p> | <p>Sales + Forecasting</p> <p>Industry specific ready-to-use sales forecasting & pipeline visibility</p> <p>From £1,300 +VAT</p> | <p>Finance + Core Financials</p> <p>Core financials</p> <p>From £5,200 +VAT</p> |
| <p>Finance + Data Migration</p> <p>Financial data migration from existing finance package (i.e Xero, Sage, QuickBooks)</p> <p>From £2,600 +VAT</p> | <p>Service + Knowledge Base</p> <p>Collaborative knowledge base</p> <p>From £1,950 +VAT</p> | <p>Sales + Reporting</p> <p>Customisable reporting & KPI management Enhanced sales reporting</p> <p>From £2,600 +VAT</p> |
| <p>Marketing + Campaign Automation</p> <p>Marketing campaign automation</p> <p>From £3,900 +VAT</p> | <p>Marketing + Email Marketing</p> <p>Email marketing training & setup</p> <p>From £650 +VAT</p> | <p>Marketing + Forms & Surveys</p> <p>Forms & surveys</p> <p>From £1,300 +VAT</p> |

Book Your Free Consultation

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