

Dynamics 365 Sales as a CRM Solution



Starter Package

Ideal for small to medium-sized businesses, our "Starter" package of Dynamics 365 Sales as a CRM Solution provides the essential tools you need to manage and grow your customer relationships. With features designed for 1-5 users, this package is designed to empower your small team with the essential tools to efficiently manage customer interactions, streamline your sales processes, and create lasting customer relationships.

Features included:

- Account & Contact Management: Centralize your customer information, making it easy to maintain relationships and track interactions.
- Activity Management: Stay organized by managing all your customer-related activities in one place.
- Email Management: Seamlessly integrate email communication within your CRM to keep conversations in one location.
- Document Management: Effortlessly store and manage important customer-related documents.
- Lead Management: Qualify leads and convert them into opportunities.
- Opportunity Management: Visualize your sales pipeline, track opportunities, and forecast revenue.
- Product Management: Keep your product information at your fingertips.
- Campaign Management: Plan, execute, and track marketing campaigns.
- Invoice Management: Manage and track invoices for your sales transactions.
- Dashboards & Reports: Gain insights with customizable dashboards and reporting.





Services included:

- Setting up D365 Environment: We'll create and configure your Dynamics 365 environment.
- Configuration + Customization: Tailor the CRM to suit your unique business needs.
 - Document Settings: Configure document management settings for easy access.
 - Basic Sales App Configuration: Customize the sales app for a smooth user experience.
 - Set up Branding & Theming: Add your branding to create a consistent look and feel.
- Basic Security Configuration: Ensure your data is secure with basic security settings.
- Basic Customization: Customize fields, forms, and views as required.
- Basic Dashboard & Reports: Create and configure basic dashboards and reports.
- Discovery Sessions: Collaborate with our team to understand your specific requirements.
- Admin Training: Train your team on how to manage and administer the system.
- Functional/User Training: Ensure your users are proficient in using Dynamics 365.

This package seamlessly integrates with SharePoint for document management and collaborative workflows. The implementation is completed in a time frame of 2.5 weeks at a cost of \$19,500, with licenses required for D365 Sales Professional at \$88.20 CAD per user/month.

Business Package

Our "Business" package of Dynamics 365 Sales is designed for growing businesses, accommodating 5-10 users, and offers an expanded set of features for more robust customer relationship management. With an array of added capabilities, this package empowers you to take your sales processes to the next level.

Additional features included:

- Case Management: Efficiently handle customer support cases and inquiries.
- Forecast Management: Accurately predict sales revenue to make informed decisions.
- Goal Management: Set and track sales performance goals and targets.
- Sales Engagement: Engage with customers and prospects effectively throughout the sales journey.
- Guided Selling: Utilize guided selling techniques to increase sales conversion rates.

Additional services included:

- Shared Mailbox Setup: Streamline email communication through shared mailboxes.
- Standard Security Configuration: Implement robust security settings to protect your data.
- Standard Customization: Customize fields, forms, and views to align with your business processes.
- Standard Dashboard & Reports: Create and configure advanced dashboards and reporting.
- Migration (up to 3500 records): Migrate your data seamlessly for a smooth transition.
 - Data Assessment: Analyze your existing data to ensure it's utilized effectively.
 - Data Mapping: Map your data to ensure seamless integration and accessibility.



This package seamlessly integrates with SharePoint and Microsoft Teams (only internal) for document management and collaborative workflows. The implementation is completed in a time frame of 4.5 weeks at a cost of \$35,100, with licenses required for D365 Sales Enterprise at \$128.90 CAD per user/month.

Premium Package

Our "Premium" package of Dynamics 365 Sales is the ultimate solution for businesses that demand excellence in customer relationship management. Designed for teams of 10–20 users, this package provides an extensive set of features, services, and integrations to supercharge your sales efforts and transform the way you interact with your customers.

Additional services included:

- Shared Mailbox Setup: Enhance email communication efficiency with streamlined shared mailboxes.
- Advanced Security Configuration: Implement robust security settings to safeguard your valuable data and maintain compliance.
- Advanced Customization: Tailor fields, forms, and views to align precisely with your unique business processes.
- Advanced Dashboard & Reports: Create, configure, and access advanced dashboards and reporting for data-driven insights.
- Migration (up to 5000 records): Seamlessly migrate your data for a smooth transition, supporting continuity and accessibility.
 - Data Assessment: Conduct in-depth analysis of your existing data to optimize its utilization and value.
 - Data Mapping: Expertly map your data to ensure seamless integration and accessibility across your CRM platform.
- Integration with Sales Nav (CRM Sync): Seamlessly connect and synchronize your CRM with LinkedIn Sales Navigator to supercharge your sales and outreach strategies.

This package seamlessly integrates with Outlook, SharePoint, Teams (internal only), Sales Accelerator (limited), and LinkedIn Sales Navigator for document management and collaborative workflows. The implementation is completed in a time frame of 10 weeks at a cost of \$78,000, with licenses required for D365 Sales Enterprise at \$128.90 CAD per user/month as well as subscription plans for MRS or LinkedIn Sales Navigator.

Ultimate Package

For more customized and elaborate packages contact our teams [@creospark.com](https://www.creospark.com)