



Vision & Value

CRM VISION AND
VALUE ENGAGEMENT

What is Vision and Value?

Vision and Value, formerly known as Catalyst, is a **strategic framework** designed to elevate customer experience across all departments and functions. This structured approach analyses the current state and **identifies future solutions by helping companies uncover key challenges and co-create innovative solutions that drive measurable business value.**

With a focus on unifying customer data and streamlining processes, Vision and Value leverages Microsoft's powerful tools to deliver consistent, personalised experiences and drive organisational growth.

Vision and Value is a transformative initiative that empowers organisations to break down silos, align teams, and create a unified focus. By understanding the current state of the organisation and the challenges faced, as well as the capabilities of this technology, it ensures that everyone is working towards a unified direction to enhance customer engagement and drive success.

Many CRM projects fail to deliver their intended benefits, with up to 63% falling short of expectations (Gartner, 2023). Often, they lack alignment with tangible business value, becoming mere technical implementations rather than tools for business growth. We believe in co-creating value with you to choose the right solution, align it with real business objectives, and build a compelling business case showing tangible benefits. Once the data is integrated, it provides a centralised view of the customer and enables users to provide informed and effective support.

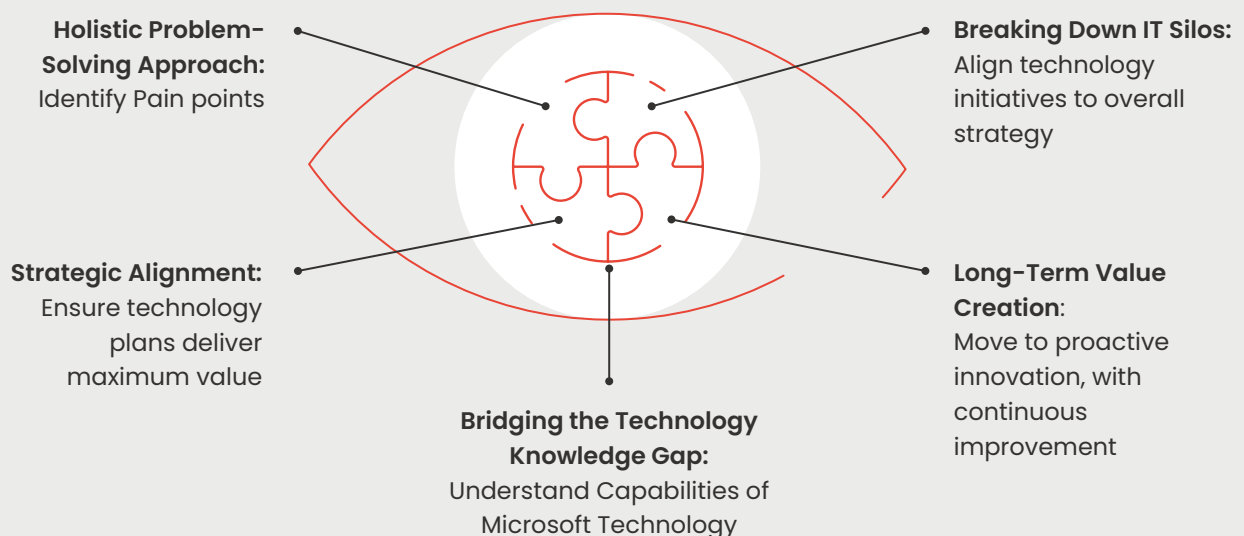
Let's connect the dots between technology and business to drive real growth.

Unlock the Power of Technology to Drive Strategic Objectives

Organisations face an overwhelming number of challenges and an infinite array of problems, all while operating under constrained budgets. The complexity of these challenges can be further exacerbated by a limited understanding of how technology—especially the Microsoft technology stack—can effectively address these issues and propel businesses toward their strategic goals.

Vision and Value provides businesses with a proactive approach to reassess what your main pain points are, realign with the strategic objectives and ensure there is adequate prioritisation to deliver a future state roadmap.

Key Benefits of the Microsoft Vision and Value Process:



Vision and Value will help showcase the tangible benefits and ensure your investments are Business & IT-aligned, offering:

- ▶ improved communication and collaboration across teams for more cohesive project outcomes
- ▶ more informed decisions with a clear understanding of how the solution will work in practice,
- ▶ speeds up the implementation process as it reduces time to value.
- ▶ Organically allows for change management processes to be incorporated into.
- ▶ A robust, future-proof business model that can adapt to changing market conditions and technological advancements.

A Phased Approach to Designing Great Customer Service

Your customers are your biggest asset. It's not enough to offer a good product, you must also deliver consistent and above-average experiences for your customers, or they will go to your competitors.

Like any valuable asset, it is essential to invest wisely in order to protect and grow it. There is ground-breaking technology available today that can help you deliver great, consistent service to your customers across all departments, touchpoints, and communication channels. However, if this technology is not adopted, not effectively utilised, or not tailored to your organisation's unique needs and correctly implemented, your investment risks being lost. This could regress back-to the many manual processes and the litany of back-and-forth emails you deal with daily. Worse still, customer dissatisfaction may grow, prompting them to seek solutions elsewhere.

When implemented correctly, this technology can position your organisation as a market leader, allowing your business and profits to thrive.

- ▶ So, where do you start?
- ▶ How can you avoid common pitfalls with technology implementations gone wrong?
- ▶ How can you maximise business value?

That’s where our Vision & Value approach comes in.

Phase 1:
Engage Your People

Inclusion: Start by involving people from across your business. Often, different departments operate in silos, leading to disjointed customer experiences. By including your team early, they understand the mission deeply and are more likely to support the initiative. This inclusion fosters buy-in and ensures your people are aligned with the vision.

Phase 2:
Align Your Team

Continual Alignment: Aligning your people is crucial for consistent service delivery. While opinions may differ, continuous alignment ensures that all stakeholders stay committed to a shared focus. Make alignment a continuous process, with regular check-ins to keep everyone accountable.

Phase 3:
Identify Key Challenges

Focus on the Right Problems: Uncover and prioritise the most critical challenges your business faces. Engage with those on the front lines through interviews to understand their pain points. Facilitate structured workshops to prioritise challenges and decide where to focus resources for the most impact.

Phase 4:
Understand the Risks of Inaction

Evaluate Costs of Status Quo: Once the challenges are identified, assess the risks of not addressing them. Showcase how technology can unify and enhance customer service. Use case studies to show the benefits others have gained, and challenge current methods with new ideas. Gather feedback to refine and prioritise initiatives.

Phase 5:
Co-Create the Solution

Design the Future State: Collaborate to design solutions tailored to your unique business needs. This phase involves creating a roadmap of initiatives, each with clear objectives aimed at delivering measurable business value. Consider cost, timeframes, and the specific processes required to solve each problem.

Phase 6:
Assess Project Viability

Evaluate Business Impact: Assess whether the proposed solutions will deliver tangible business value within the desired timeframe. Consider return on investment, team adoption, resource availability, customer impact, and potential new revenue streams. Ensure the initiatives align with compliance needs and market competitiveness. Ultimately, confirm that the business case justifies the investment.

This process catalyses new thinking, aligns stakeholders, prioritises initiatives, and produces a sound and measurable business case. If it doesn’t, then at least you didn’t waste money, time and resources chasing a dream. If it does, tremendous business value lies ahead, and we should get started in earnest.

Select Your Dynamics 365 Module



Sales Acceleration

Learn how the Dynamics 365 Sales capabilities empower sellers and sales teams close more deals by improving productivity with next-generation AI and real-time insights in the flow of work



Service Modernisation

Discover how you can transform service experiences by empowering agents to drive faster resolutions using generative AI and automation. Dynamics 365 offers comprehensive support and service management through a centralised approach.



Customer Insights

Understand how Dynamics 365 can help deliver connected marketing and sales customer journeys by unlocking siloed data and creating personalised, real-time and contextual experiences with predictive insights and next-gen AI.

Stakeholders required to take part:

To successfully deliver on the Vision and Value engagement we would require the following stakeholders to actively participate.



Funding Opportunities

There is funding available for eligible opportunities that meet specific criteria. These requirements will be discussed with an Architect during your discovery meeting. While not all projects may qualify for funding, our goal is to find the best solution for your needs. **Help us understand your requirements by preparing this information:**

In service:

- ▶ How many service centre agents need to be considered?
- ▶ How many tickets do you deal with weekly/monthly?
- ▶ What integration scenarios do you need to accommodate?

In Marketing & Sales:

- ▶ How many contacts are on your marketing database?
- ▶ How many leads do you deal with weekly/monthly?
- ▶ How many users will need to access the system?

In ITSM or Enterprise Services:

- ▶ How many staff members does your organisation have in total?
- ▶ How many users will this solution need to accommodate?
- ▶ What are you currently using to manage IT Services? i.e. a Helpdesk, Ticketing Desk etc.

Business Architecture Engagement:

If you don't meet the specific criteria needed to apply for funding, there are options for your organisation to co-fund this valuable engagement.

How to get started – Next Steps

- ▶ Schedule a Discovery Meeting
- ▶ Confirmation of Engagement
- ▶ Identify stakeholders
- ▶ Enterprisecloud to apply for Vision & Value
- ▶ Online consent for engagement
- ▶ Upon engagement approval, the pre-engagement questionnaire is to be completed.

Schedule a Discovery Meeting

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About Enterprisecloud

Enterprisecloud is a highly specialised Business Applications Solutions Partner that focuses solely on Dynamics 365 and Power Platform implementations for Sales, Service, and Marketing within industries such as Higher Education, Financial Services, Logistics, Nonprofit and Retail. We service our clients around the world, from South Africa.



Microsoft Dynamics

CUSTOMER ENGAGEMENT
PARTNER OF THE YEAR
WINNER

2021



Microsoft Dynamics

CUSTOMER ENGAGEMENT
PARTNER OF THE YEAR
FINALIST

2022



Microsoft Dynamics

INDUSTRY SOLUTION
PARTNER OF THE YEAR
(NON-PROFIT)
WINNER

2022



**Book a
Discovery Call**