



# CRM CORE TEAM PREP

*1/2 DAY WORKSHOP*



Help your core team get prepared for an upcoming Dynamics 365 CRM initiative. When CRM is initiated, many companies assemble a team of Subject Matter Experts (SME's) representing various parts of the business who they charge with becoming power users. In high performing organizations, this core team of SME's is an ongoing construct. This core team workshop is a combination of sessions including online training and homework, plus two one-on-one 90 minute review sessions. When the core team understands best practices, they will have a strong plan going into a CRM initiative. Fullscope has seen a dramatic increase in the level of customer success when this methodology was introduced.

# Why a Core Team Matters

When CRM is implemented, many companies assemble a team of Subject Matter Experts (SME's) representing various parts of the business. In high performing organizations, the core team is an ongoing construct. The members may change but there is always a group of business SME's that have CRM as part of their job.

A key attribute of the members of this team, in the vast majority of cases, is that all the members of the core team are what we call power users. They have a deep knowledge of CRM functionality, not administration or configuration, but how it is used and what it can do right out of the box.

The obvious benefit is that they are more productive and better able to help others

understand it. Because they understood how CRM works, they could work and communicate more effectively with their CRM administrators to enhance the system without custom development. They were also able to identify other areas in the business that could benefit from CRM technology with little effort.



# How Fullscope is Helping Teams

Fullscope, an Alithya company is an award-winning Microsoft Dynamics partner, with over 10 global and national Microsoft awards. We help executives in industries like manufacturing and professional services improve their CRM initiatives with best practice driven business outcomes methodology. We also have unique adoption and training services to ensure your firm understands and embraces the latest technologies, ultimately providing improved levels of service for your customers.

Want to know more?

Schedule a Workshop at (866) 420-7624.