



Dynamics 365 Tailored Demo

A Front-row view of transformation

See Dynamics 365 and Copilot in action in this immersive experience.



Common CRM complaints

Inefficiencies

- **Disconnected teams and data:** Teams operate in silos, leading to misinformed decisions and strategies.
- **Lacking technical innovation:** Technologies leave you unable to meet evolving market demands.
- **Inefficient workflows:** Cumbersome processes consume unnecessary time and negatively impact customer experience.

Limitations

- **Complex User Interface:** Users find the CRM system difficult to navigate, leading to frustration and decreased productivity.
- **Poor Integration:** The CRM does not seamlessly integrate with other essential tools and systems, causing data silos and workflow disruptions.
- **Lack of Customization:** The CRM lacks flexibility, making it hard to tailor the system to specific business needs and processes.



About the tailored demo

Experience a curated demo for your organization that showcases Dynamics 365 and Copilot in the scenario of your choice. The tailored demo may include visual assets, solution demonstrations, and/or hands-on experiences.

Deliverables

- Scenario identification
- Current process discussion
- Strategic business drivers definition
- Technology roadblock discovery
- KPI identification
- Business/technology requirements discovery
- Tailored demonstration of D365 and Copilot

TrellisPoint
Growth the Strategic Way
Microsoft
Solutions Partner

DYNAMICS 365 TAILORED DEMO

A FRONT-ROW VIEW OF TRANSFORMATION
See Microsoft Business Applications in action through immersive experience that addresses the most pressing issues you face today. This tailored demo uses your CRM data to illustrate how you can transform your sales and/or service experience by migrating to Microsoft Dynamics 365.

BRING IN OUR EXPERTS TO HELP YOU GET STARTED
Through our partnership with Microsoft, we curate a demo experience for your organization that showcases Dynamics 365 and Microsoft Copilot in the scenario of your choice. The tailored demo may include visual assets, solution demonstrations, and/or hands-on experiences.

WHAT WILL WE LEARN?
Experience the advanced capabilities of a Dynamics 365 and Copilot through a demo based on your target scenario.

WHO SHOULD ATTEND?
Decision makers, managers, and power users from the team are encouraged to participate, as well as executive-level sponsors.

WHAT HAPPENS AFTER?
At the completion of the demo, you'll receive a thorough report with detailed findings and recommended next steps.

GET TO KNOW TRELISPPOINT
With extensive solution development experience, TrellisPoint can help you improve your workforce productivity by leveraging Microsoft Dynamics 365 and the Microsoft Power Platform. We will work with you to understand your environment and identify where the opportunities are to achieve continuous business value from your Microsoft investments.

TEST DRIVE YOUR NEW CRM
Discover what a day in the life looks like for key personas as you navigate your future CRM environment through a tailored demo. See the value of creating a connected business with Dynamics 365.

"We hired a firm and got a partnership! TrellisPoint helped transform my business model from a consulting service to a SaaS-based managed service company. They took my proven methodology and business processes and created a product that enables me to scale, drives operational efficiency and delivers more value-added services to my clients."
- Erin Figer | Alliance Strategist | Core Consulting LLC

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Industries Served



Construction



Financial Services



Information Technology



Manufacturing



Non-Profit



Retail



Professional Services



Distribution



Healthcare



MILESTONES/VALUES

-  **Implementing Microsoft Business Applications since 1998**
-  **Providing D365 Implementation Services Since the 2001 Beta Release of "Microsoft CRM"**
-  **Microsoft Business Applications Partner - 100% Microsoft Focused since 2018**
-  **Emphasize Reputation Over Revenue**
-  **Guided by "The Business Why"**
-  **Proven D365 Project Methodology**

Why TrellisPoint?

TrellisPoint is a strategic growth consulting firm and Microsoft Solutions Partner specializing in technologies such as Microsoft Dynamics, Power Platform, and AI (Copilot), and transformation services such as business process engineering and organizational change management. We collaborate with growing companies that are looking to transform technology from a cost center into a key differentiator. Our proven TrellisPoint Success Framework delivers flexible solutions that will provide value for your present and future requirements. At TrellisPoint, your success is our success.



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