

### **Dynamics 365 Tailored Demo**

A Front-row view of transformation

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



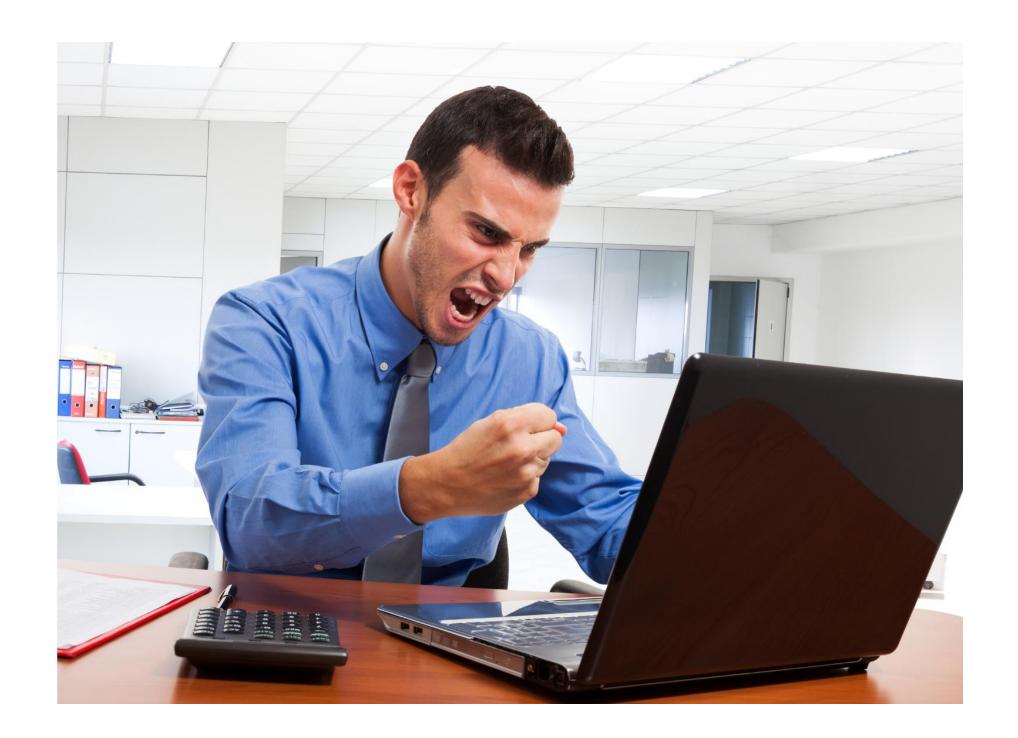
# Common CRM complaints

### 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.



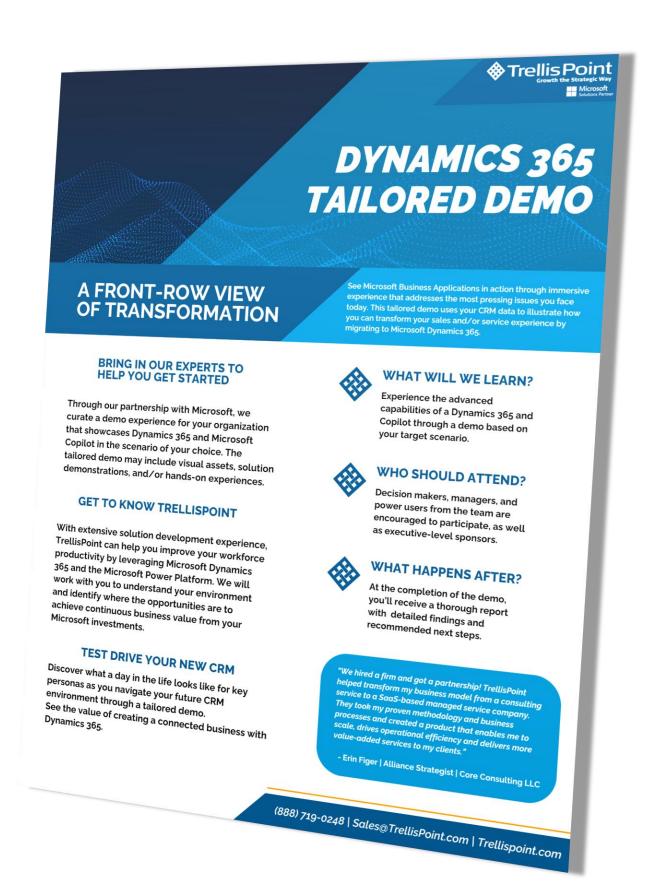
## About the tailored demo



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



### Industries Served



Construction



Retail



**Financial Services** 



**Professional Services** 



Information Technology



Distribution



Manufacturing



Healthcare



Non-Profit



## 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.

#### **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



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