



# CRM Vision and Value

Your fast route to a CRM transformation

Unify your teams & data to transform customer experiences



# 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 CRM Vision and Value Engagement

A unique 2-week engagement for your organization to build the business case and provide more clarity and resource requirements, timelines, and outputs for a switch to Dynamics 365.

## Deliverables

- **Assessment:** Discuss your business priorities and future-state priorities including fit-gap analysis with your current CRM platform.
- **Art of the possible:** Clarify how Dynamics 365 can support all current and future business requirements.
- **Build the plan:** Get a Board-ready business case with quantified ROI, best practice migration plan and a transparent path to value.

**TrellisPoint**  
Growth the Strategic Way  
Microsoft Solutions Partner

## CRM VISION AND VALUE ENGAGEMENT - YOUR FAST ROUTE TO A CRM TRANSFORMATION

**MICROSOFT EXPERTS ARE HERE TO HELP YOU TAKE THE NEXT STEP. LET'S TALK.**

We needed a single CRM solution that our employee embraced, was cost effective, and proved it could grow with us as a business. That's why we chose Microsoft Dynamics 365.

- Pepijn Brinkhoff, Lead Product Owner, ABN AMRO

### UNIFY YOUR TEAMS & DATA TO TRANSFORM CUSTOMER EXPERIENCES

Are you struggling with disconnected teams and data? It's time to break down the silos and unify your efforts! Traditional CRM systems often lag behind today's rapid tech evolution, potentially causing you to miss out on innovative features that could propel your business forward. Plus, your teams' time should be spent building customer relationships, instead of being lost on mundane tasks. Let's explore how we can streamline your CRM - freeing up your teams on what matters most — your customers.

### DYNAMICS 365 SAVES YOUR PEOPLE'S TIME AND HAS POSITIVE IMPACT ON YOUR BOTTOM LINE

- Reduction in gathering, analyzing and reporting of sales data
- Double the revenue growth of CX leaders vs CX laggards
- Decrease in average service agent handling time

### OUR OFFERING:

A unique 2-week engagement for your organization to build the business case and provide more clarity on resource requirements, timelines and outputs for a switch to Dynamics 365

- 1. Assessment**  
Discuss your business priorities and future-state priorities including fit-gap analysis with your current CRM platform.
- 2. Art of the Possible**  
Clarify how Dynamics 365 can support all current and future business requirements
- 3. Build the Plan**  
Get a Board-ready business case with quantified ROI, best practice migration plan and a transparent path to value.

(888) 719-0248 | Sales@TrellisPoint.com | Trellispoint.com

# 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.



[www.trellispoint.com](http://www.trellispoint.com) | [info@trellispoint.com](mailto:info@trellispoint.com) | 888.719.0248



## Cleveland

10091 Brecksville Rd., Suite B  
Cleveland, OH 44141



## Cincinnati

4520 Cooper Rd, Suite B  
Cincinnati, OH 45242



## Louisville

1400 Main Street, Suite 180  
Clarksville, IN 47129