

CRM Vision and Value

Your fast route to a CRM transformation

Unify your teams & data to transform customer experiences



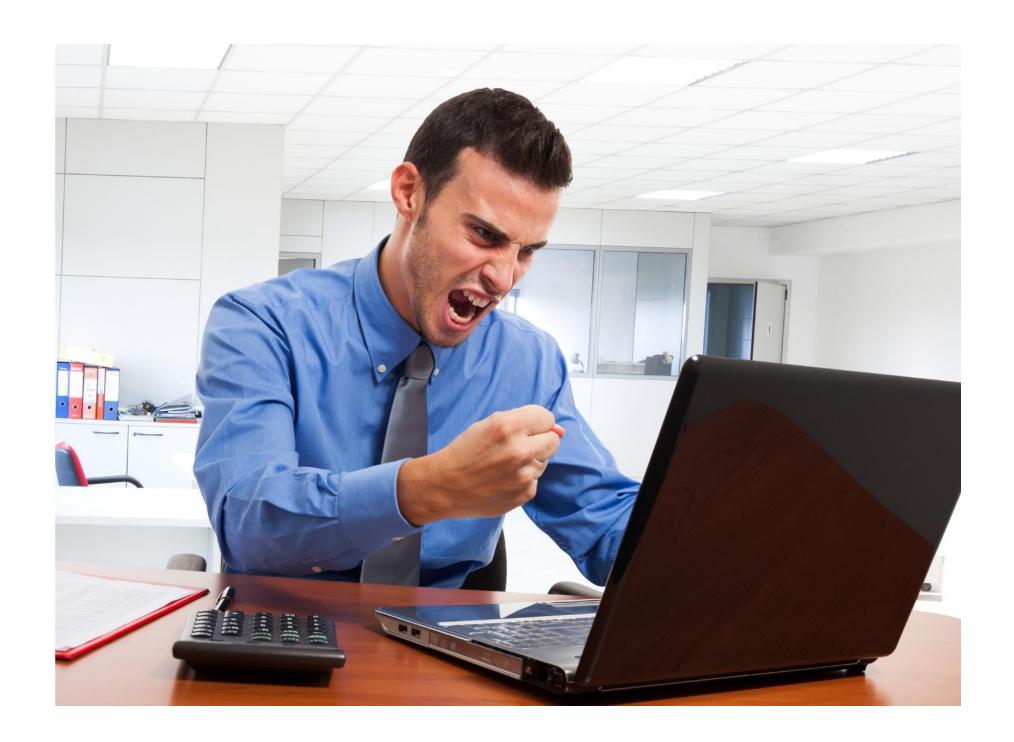
Common CRM complaints

Inefficiencies

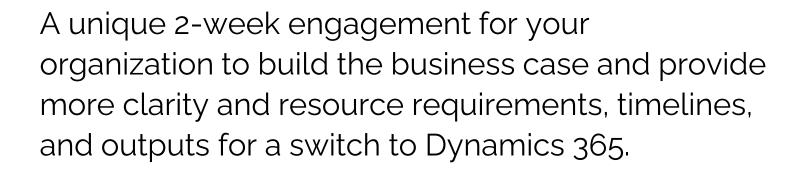
- **Disconnected teams and data**: Teams operate in silos, leading to misinformed decisions and strategies.
- Lacking technical innovation: Technologies leave you unable to meet evolving market demands.
- **Inefficient workflows**: Cumbersome processes consume unnecessary time and negatively impact customer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



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.



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



www.trellispoint.com | 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