



We help Small Businesses fix their D365 CRM



Overview

Dear Potential Client.

I don't need to tell you how important your business processes are to your brand, your potential customers, and your ability to interact with clients. How your systems operate internally directly impacts the client experience

It all ties together in your CRM: the central repository for key client detail, account management, sales pipeline, issue resolution, business development funnel and marketing engine. Do you need help in one or all of these areas?

At UniverseIT, we can make this all happen with more gain than pain. I will take your sales and/or service processes and build them into your CRM so that you and your team can start executing.

I have been implementing D365 CRM for over 10 years for tiny companies to the largest employers. Most of that in the Microsoft Partner channel. For 10 years before that I was a franchise and also franchisor. It was a training ground for business systems and processes for sales service and marketing.

To be honest, I prefer working with smaller companies because we can have more fun and make more impact. I have designed my services around providing the most impact to help you get best-in-industry consulting and configuration with fluidity of freelance service.

Sincerely,

Darren Grover
CRM Chief Implementer
UniverseIT.com

Scope of Services

Configuration and Customization

Microsoft ships D365 CRM out of the box, BROKEN. If your CRM has not been properly setup or maintained chances are it may not be working the way you think it is. Good news is that we have been configuring D365 CRM since the beginning of time so we can often come up with out of the box (already built features) Dynamics 365. We will work with you to define your process and set it up in CRM

- Customizations and configurations
- Dashboards and views (reports)
- PowerBI
- PowerAutomate integrations
- Data imports
- New user setup and onboarding
- CRM workflows
- Business process flow
- Email Templates
- Signatures
- Training and how-to

Strategy and Tactics

How should we implement CRM at your team or business? What works, what doesn't? How do we plan ahead? What questions should we be asking? How do we start using it? How to train users?

All great questions that are unique to each business. We will help you plan for this change as well as future challenges facing your business. Whether you are facing specific challenges or need someone to help you get to your end goals sooner, we will bring you the best practices that work in CRM.

Coaching

In order to make you successful at CRM, it will involve making sure you have the tools and knowledge needed to handle ongoing change in your business. We can coach you to be the CRM expert at your organization.

Support

We are not a help-desk for your end-users! However, we absolutely will do everything we can to help solve your problem as quickly as possible. Did you know you get free support from Microsoft? This is often an untapped resource and we can help you use the support you already get to your advantage.

Options For Working With Me

CRM Lifesaver package

This is the quickest way to solve your problem. This is a 2 week engagement where I will block off and dedicate time to solving your main CRM problems and get you configured, setup, and start using the tool. Usually we cap it off with a recording training you can use for reference ongoing.

A typical lifesaver package looks like this:

- Need to setup or unkink a sales or service process
- Once I have access will setup proper configuration and apply basic customizations that fix what comes broken.
- We will meet to review and discuss process, often making changes directly in CRM to fit your needs. This is often 1 to 3 meetings. When we aren't meeting I am configuring changes.
- Once we have iterated the process and fields needed, we will have a training session recorded that you can use ongoing. (Usually an hour or so)

Monthly service

My monthly service is a 1:1 weekly call where we can discuss, screenshare, configure, etc.

I recommend my monthly service for three scenarios:

1. We have executed a CRM Lifesaver and you need me to help you manage ongoing or want to build out your business.
2. You just need coaching or support. You have lots of problems we can't solve in two weeks but need help ongoing as changes or issues arise.
3. Can't afford the cost of hiring a full time employee but need a CRM administrator in your organization to help build out your CRM.

Hourly

Although I do often share my advice for free, we do not have an hourly service at this time. We tend to focus on solving the problem and not time.

Typical CRM CHIEF Implementation

To get anyone through phase 1 it does take some time. Most clients once we have kicked off and engaged take 1-2 weeks to get to recorded training session. Also you or your teams availability may be constrained and delay. Thats ok.

Here is an example of what YOUR time commitment would look like

Description	Time
Initial Kickoff (get me access, identify key problems to solve)	1-2 Hours
Discovery Design Build Sessions	
Once I have access an base solution in place we will meet and I will take you through key design decisions in the process. You will provide any process documents, data or lists, key reports, etc. Typical sessions are 1 to 2 hours	3-5 Hours
Decisions and data	
Vaious tasks or decisions come up that make take extra time to resolve (on your side or our side). Things like: testing new process in CRM, cleaning excel data to prepare for import, identifying key stages and steps in your process, email content needed, key people needed to be involved, etc.	1-10 Hours
End User Training	
Once we have process nailed down in CRM, we will have a recorded training session that can be shared and used ongoing	1-2 Hours

Typical Monthly Service

We can do a lot in one month! Get a dedicated CRM Expert in your business, that understands your needs. Major efficiencies gained over time.

1. CRM Chief Premium
 - Full admin and build-for-you capability to help achieve a fully automated CRM
 - Best suited for those that need a CRM admin but don't need to invest in Full time staff
 - Want ongoing coaching, best practices, support, and ongoing unlimited changes.
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What does our weekly call look like?

I like to setup a standing call weekly at same time, typically for 1 hour, at the same time every week.

We usually cover the following on our weekly calls:

1. Review any updates from changes I have made for you
2. Any training needs or how-to
3. Identify new changes and task work needed
4. Best practices
5. Discuss strategy



Why Us?

How often can you find an expert who not only understands their product, but also your business? Magical things can happen when we pair expertise with experience.

My services are designed to deliver the most value with least amount of overhead. Need more information about me? You can find my full background [here](#).

I not only understand and have implemented D365 CRM literally in hundreds of businesses, but I have been an entrepreneur as well. I have 20 years experience running my own business. I can speak your language.