

GET UP AND RUNNING ON
**MICROSOFT
DYNAMICS
365 FOR
SALES**

WITH



SERVICES

HEADSTART

 **SIKICH®**

WHAT IS OUR **OFFER?**

Get **MICROSOFT DYNAMICS 365 FOR SALES** turned on
with our **SIKICH HEADSTART CRM** starter pack.

15 users up and running **in one month.**

Your sales team will be able to:

- Set up and manage accounts and contacts, and manage activities
- Create leads and opportunities and step them through a simple guided sales process
- Use their app with mobile and Microsoft Office 365 Integration*

Your sales leaders will be able to:

- Improve visibility into sales activity, customer relationship status and pipeline metrics
- Expect easier remote collaboration on account activity and planning
- Anticipate smoother role transitions in the sales team

*Terms and conditions apply. License costs not included



Easy to use, powerful functionality. CRM built on the Power Platform.



100% Remote Delivery

Pre-configuration

- A set of proven baseline configurations copied from our Best Practices template for manufacturers
- Set up of all users
- Basic Security roles ready to apply – Admin, Sales Manager and Sales Rep

Personalization

- 1 guided sales process set up the way you want it
- 1 workflow or alert configured

HEADSTART Project Workbook includes:

- Business Value / ROI calculator
- Kick off presentation templates to use with your team
- Standardized project plan with tasks lists for your team
- Standard workshop agendas
- Standard training plan
- Super User Training material
- Selection of recommended supplementary reading and training material links for your team



WHAT DOES A PROJECT LOOK LIKE?

WEEK

1

- Project Kick-Off
- Provision the software
- Load the pre-configuration
- Create users and set up security
- Integrate Microsoft Office and Mobile
- Prepare and distribute Project Workbook
- **WORKSHOP 1**

WEEK

2

- Configuration Alignment
- Custom field setup
- Sample Data Load
- **WORKSHOP 2**

WEEK

3

- Configuration Alignment
- Data Template Distribution
- Dashboard Setup
- Super User Training
- **WORKSHOP 3**

WEEK

4

- Final Configuration
- Final User Acceptance Testing
- End User Training Support
- **APPLICATION LIVE**

GO! \$

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SO IF THAT WAS A
CRAWL

WHAT IS A **WALK/RUN?**

With the groundwork established, SALES is just
one piece of a comprehensive system of customer
engagement apps

You choose what is next...

SALES INSIGHTS

ERP INTEGRATION

MARKETING

CUSTOMER SERVICE

FIELD SERVICE

QUOTES+ORDERS

ERP INTEGRATION

CUSTOMER INSIGHT



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PRE-REQUISITES, RESTRICTIONS & LIMITATIONS

- Requires software acquisition of up to 15 Sales Professional Users* (\$65 Retail** per User/month) or Sales Enterprise Users* (\$95 Retail per User/Month) prior to project kick off.
- A maximum of 15 users of CRM including Administrator, Sales Managers and Sales Team
- All Microsoft Office integrations require active licenses for Microsoft 365
- Current versions of Microsoft 365 are required for integration (Valid versions of E3 or E5)
- With Microsoft, you agree to appoint Sikich LLP as your Claiming Partner of Record (CPOR), and associate us to your Dynamics subscription for a minimum of 12 months.
- Excludes any custom development or custom integrations
- Excludes any PowerApps and Sales Insights
- All Data Migration will be performed manually

*** Retail pricing provided at time of publishing.*

HELPING YOU **FASTRACK** APPROVAL WITH TOOLS TO **SUPPORT YOUR** **BUSINESS CASE**

We are ready to help you produce your business case with our simple ROI calculator and our inventory of Business Value Analytics. Below is an example for an Equipment Manufacturer.

SIMPLE INPUTS

Microsoft Dynamics 365 CE ROI Calculator

SALES

Number of Sales Reps	20
Average Salary	\$80,000
Average Annual Quota	\$500,000
Average Quota Attainment	80%
Average Revenue Produced	\$400,000.00
Average Contract Value	\$5,000
Average Time Spent Qualifying	10%
Average Per Deal Sales Cost	\$150
Current Assumed Close Rate	33%
Estimated Bad Deals Pursued Per Year	50
Average Sales Cycle in Hours	7

OUTPUTS

Results of ROI from Sales

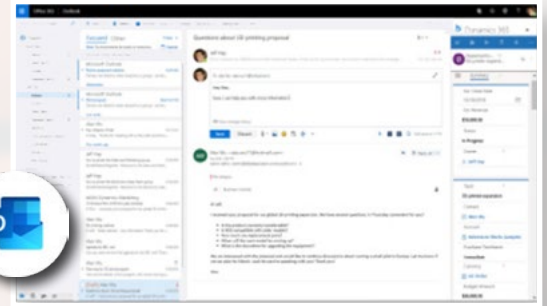
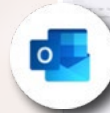
DELIVERY AREA

Eliminating working "bad" deals	\$ 75,000.00
Savings in Sales Costs	\$ 3,750.00
Increase in Percentage of Quota	94%
Total Increase in Team Revenue	\$ 1,385,006.25
Total Increase in Personal Revenue	\$ 69,250.31
Time Saved Due to Better Qualification	509
Increased time working new deals	1050

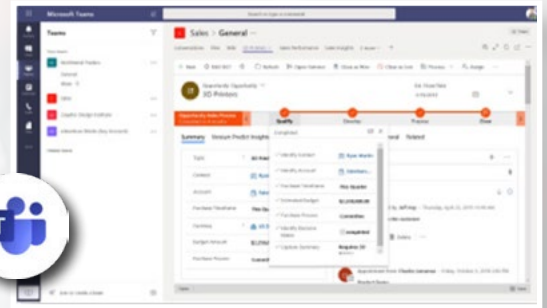


FOCUS ON WHAT'S IMPORTANT

**Tailor interactions
with customers**



**Get guidance
toward optimal
outcomes**

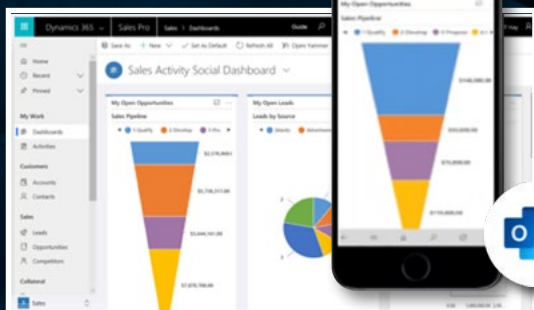
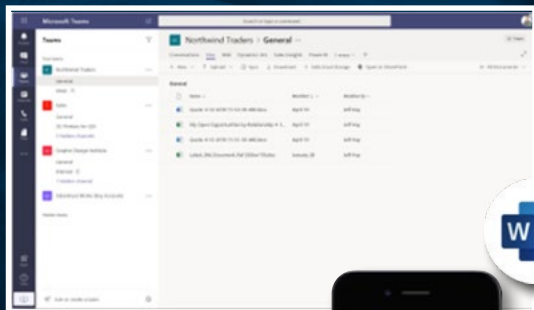


**Get actionable
insight to
increase
performance**



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USER'S WORKFLOWS



MICROSOFT PARTNERSHIP

COMPETENCIES

GOLD

- Application Development
- Cloud Business Applications
- Cloud Platform
- Cloud Productivity
- Collaboration and Content
- Data Analytics
- Datacenter
- Enterprise Resource Planning
- Messaging
- Small and Mid-Market Cloud Solutions

SILVER

- Communications
- Security



MANAGED PARTNER

- Nationally Managed one of 20
 - Dedicated Partner Account Manager
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PRESIDENT'S CLUB

- 1998-2014
 - Revenue Based
 - Top CAE and CSM
-



INNER CIRCLE

- Top 1% of Partners worldwide
- 65 members, 21 from USA
- Member 6 of last 8 years



YOUR CONTACT



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