GET UP AND RUNNING ON MICROSOFT DYNAMICS 365 FOR SALES WITH SERVICES}

WITH 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?

- 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 1**

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

**WEEK 2**

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

**WEEK 3**

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

**WEEK 4**

GO! $
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

SIKICH®
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.
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

<table>
<thead>
<tr>
<th>Microsoft Dynamics 365 CE ROI Calculator</th>
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</thead>
<tbody>
<tr>
<td><strong>SALES</strong></td>
</tr>
<tr>
<td>Number of Sales Reps</td>
</tr>
<tr>
<td>Average Salary</td>
</tr>
<tr>
<td>Average Annual Quota</td>
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<tr>
<td>Average Quota Attainment</td>
</tr>
<tr>
<td>Average Revenue Produced</td>
</tr>
<tr>
<td>Average Contract Value</td>
</tr>
<tr>
<td>Average Time Spent Qualifying</td>
</tr>
<tr>
<td>Average Per Deal Sales Cost</td>
</tr>
<tr>
<td>Current Assumed Close Rate</td>
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<tr>
<td>Estimated Bad Deals Pursued Per Year</td>
</tr>
<tr>
<td>Average Sales Cycle in Hours</td>
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### OUTPUTS

<table>
<thead>
<tr>
<th>Results of ROI from Sales</th>
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</thead>
<tbody>
<tr>
<td><strong>DELIVERY AREA</strong></td>
</tr>
<tr>
<td>Eliminating working “bad” deals</td>
</tr>
<tr>
<td>Savings in Sales Costs</td>
</tr>
<tr>
<td>Increase in Precentage of Quota</td>
</tr>
<tr>
<td>Total Increase in Team Revenu</td>
</tr>
<tr>
<td>Total Increase in Personal Revenue</td>
</tr>
<tr>
<td>Time Saved Due to Better Qualification</td>
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<tr>
<td>Increased time working new deals</td>
</tr>
</tbody>
</table>
FOCUS ON WHAT’S IMPORTANT

Tailor interactions with customers

Get guidance toward optimal outcomes

Get actionable insight to increase performance

SIKICH
STREAMLINE USER’S WORKFLOWS

Collaborate on deals in a modern workspace

Create, edit and share sales documents

Work on the go with mobile application
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

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