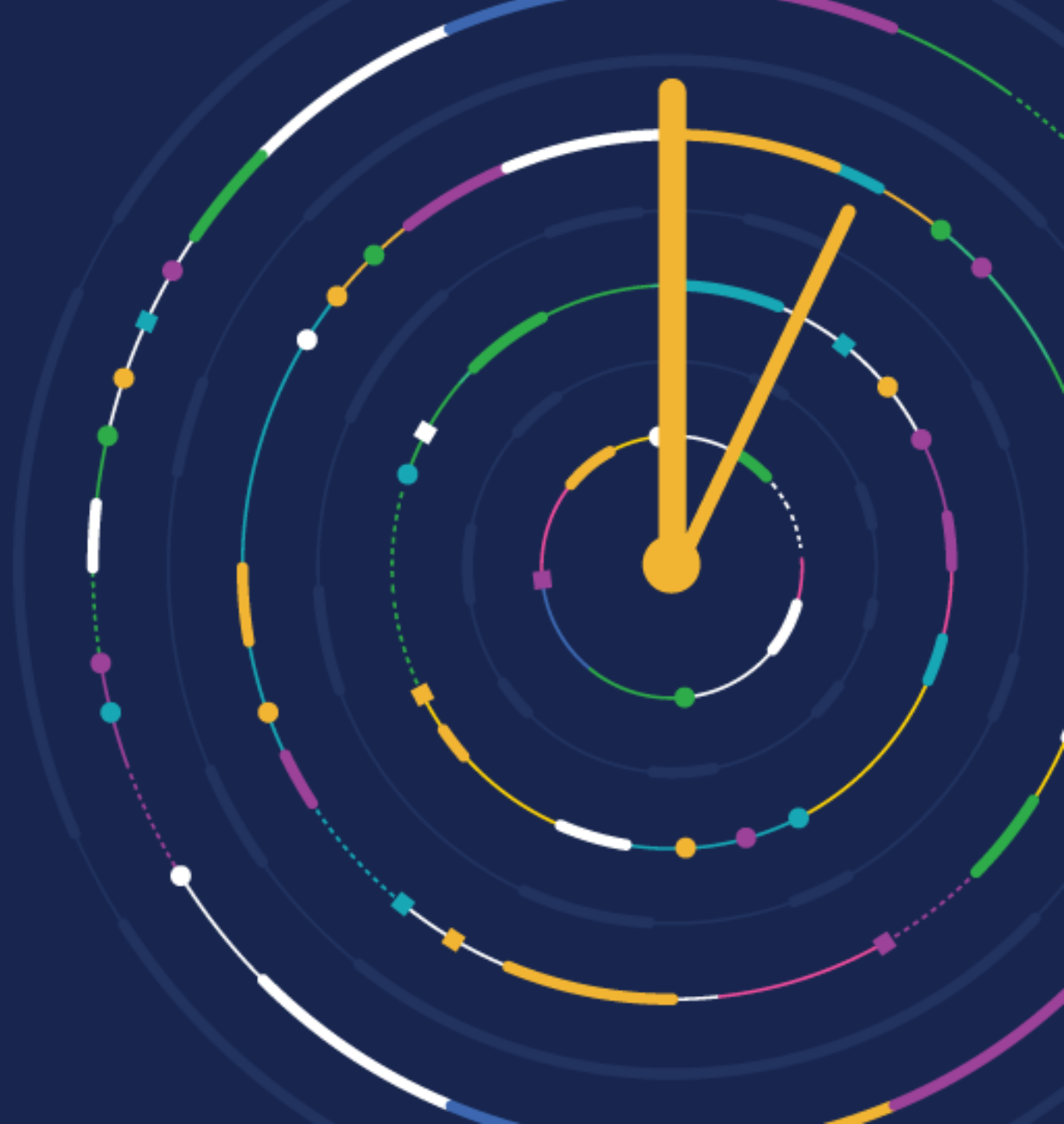




CRM for BC users: Why you need it for your sales and/or service - Why you need & can get it cheaper

Zak Bird & Jason Tromans

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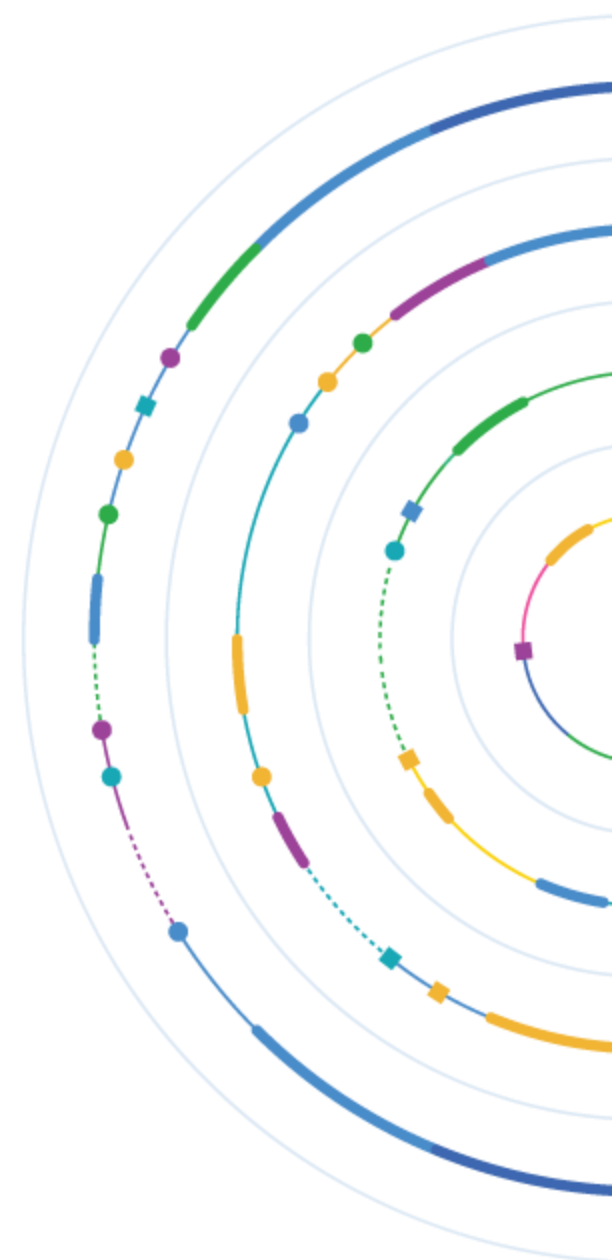


What we'll cover

1. Why CRM when have BC
2. Sales Benefits
3. Aftersales/Service Benefits
4. Marketing
5. Account Management + NCR
6. License Benefits

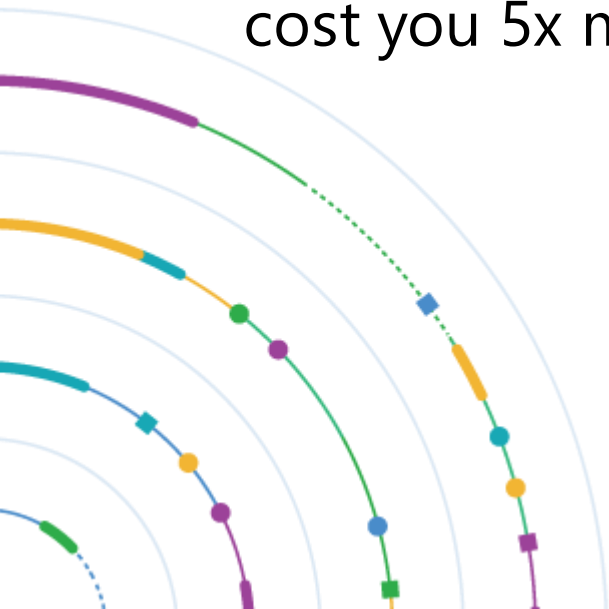
BC & CRM – Better Together

- Business Central is a best-in-class operational system for managing orders, stock, invoices and more (it's Marketing functionality isn't best in class)
- CRM is best-in-class solution for managing your relationships to help drive the business you want/need – the 'CX Journey'
- Together a combined solution that manages your business process and relationships and enables evolution and growth



What does CRM do well

- 360 view of your relationships (Customer, Supplier etc.)
- Holding key interactions and comms centrally for visibility across the business (some call it the fluffy stuff)
- Defines sales and service process (and others)
- Should be integral around customer retention (getting a new customer will cost you 5x more than keeping an existing one).



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Sales Benefits



Sales

Business Central Offers

- Quotes
- Orders
- Price Lists
- Items

- *Interactions*
- *Opportunities*
- *Marketing Segments*

Dynamics 365 Sales Offers

- Queues
- Leads
- Opportunities
- Quotes
- Orders
- Price Lists
- Products
- Business Process Flows
- Marketing Campaigns
- Marketing Lists
- Outlook Integration

Benefits of Dyn365 Sales

- Process/Pipeline for Lead > Opp > Won Business (BPF)
- Sales Management (record allocation and tracking)
- Associated Activity Management
- Interaction Tracking
- Behaviours/Analysis
- Outlook Integration
- Sales Co-Pilot

After sales / Service Benefits



Aftersales / Service

Business Central Offers

- Sales Return Orders
- Credit Memos
- Service Quotes
- Service Orders
- Service Items
- Reason Codes

- *Interactions*

Dynamics 365 Customer Service Offers

- Cases
- Routings/Swarms
- SLA
- Knowledgebase
- Quote
- Order
- Omnichannel

Benefits of Dyn365 Customer Service

- Business Process for managing different types of cases (product issue, versus invoice issue)
- SLA
- Associated Activity Management
- Interaction Tracking
- Behaviours/Analysis
- Outlook Integration
- Customer Service Co-Pilot

Marketing Benefits



Marketing

Business Central Offers

- Marketing Segments

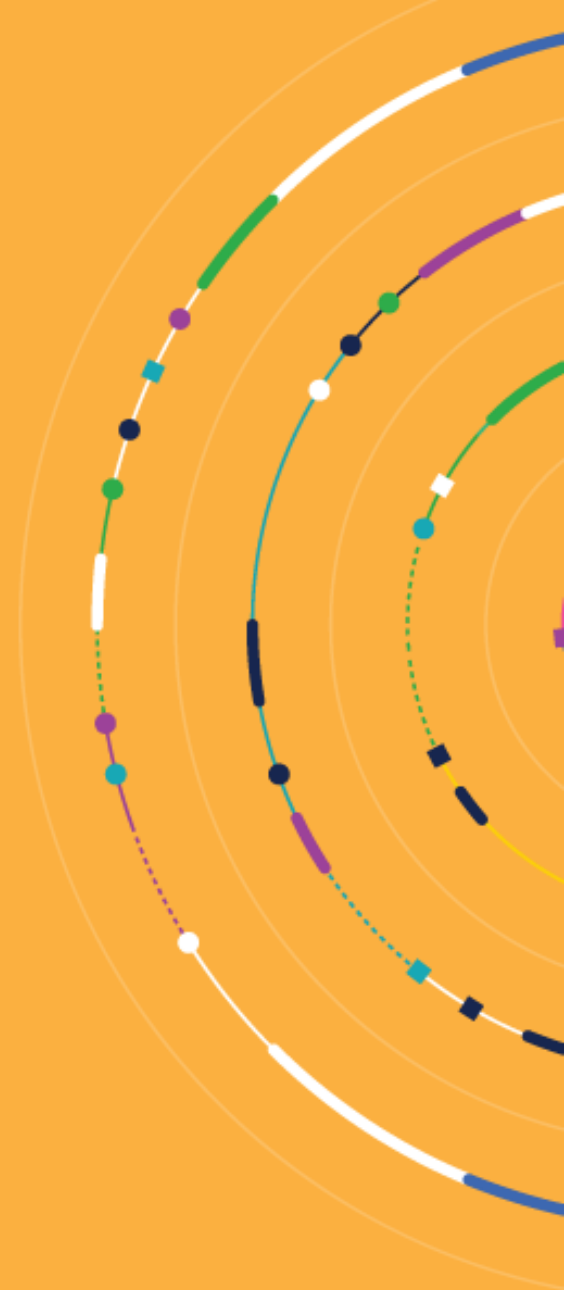
Dynamics 365 Customer Insights (Marketing) Offers

- Segments
- Emails
- Customer Journeys
- Events
- Real Time Marketing
- Marketing Forms
- Lead Scoring
- Data insights

Benefits of Dyn365 Customer Insights

- Marketing Automation – Product Promo / Custom Comms etc
- Marketing Forms – contact us / subscription preferences
- Real time marketing
- Behaviours/Analysis
- Outlook Integration
- Marketing Co-Pilot

Account Management + Non-Conformances



Frameworks by TecMan

Account Management

- Account plans
- Account Reviews
- Objectives
- Escalations
- Actions
- Discussion Points

Non-Conformance

- NCR Record & Process
- CAPA
- Triage
- Concession
- Approvals

Why a framework?

- Not starting from scratch
- Not a product – designed to be tailored per client
- Offering more than what MS have as standard
- Common challenges and queries

License Benefits

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Dynamics 365 CRM Licensing With BC



- For a while now if you had a BC subscription you could get Sales & Customer Service (CRM) PROFESSIONAL licenses at a cheaper price – called an Attach license
- Microsoft have now made Attach licensing work with ENTERPRISE CRM Apps and Business Central

Scenarios

	BC ESSENTIALS	BC PREMIUM
SALES PROFESSIONAL	BC Essentials: £57.50 + Sales Pro ATTACH: £16.40	BC Premium: £82.20 + Sales Pro Attach: £16.40
SALES ENTERPRISE	Sales Enterprise: £78.10 + BC Essentials ATTACH: £16.40	BC Premium: £82.20 + Sales Enterprise Attach: £16.40
CUSTOMER SERVICE PROFESSIONAL	BC Essentials: £57.50 + Customer Service Pro ATTACH: £16.40	BC Premium: £82.20 Customer Service Pro Attach: £16.40
CUSTOMER SERVICE ENTERPRISE	Customer Service Enterprise : £78.10 + BC Essentials ATTACH: £16.40	BC Premium: £82.20 + Customer Service Enterprise Attach: £16.40

- Base license must be most expensive
- Must be NCE license model





QUESTIONS





THANK YOU

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