



SmartStart for Microsoft Dynamics® CRM

SmartStart is designed to quickly achieve best practices and meet your sales force automation objectives, allowing you to derive value out of your CRM system immediately.

It is imperative for organizations to have a proper understanding of who their clients are and to be confident that their sales force is focusing on the right customers. An effective Customer Relationship Management (CRM) system is an invaluable prospecting tool, improving your insight into the needs of your customers, and allowing your sales force to be more productive.

Sales force automation with CRM

The McGladrey SmartStart program accelerates the benefits that your CRM system can provide, including:

- **Organizational ownership of information.** A CRM system can give your organization the necessary information to sustain relationships with prospects while keeping track of opportunities and closing deals.
- **Sales team productivity.** Sales professionals must have quick access and insight into activities requiring follow up and be able to schedule new activities seamlessly. A CRM system can enable your sales team to complete their administrative responsibilities quickly and focus on relationship building.
- **Visibility.** A CRM system can help you understand how your team is engaged and where your opportunities are, allowing you to have the most pertinent information to support business investments and decisions.

Advantages of Microsoft Dynamics CRM

McGladrey's SmartStart program was exclusively developed for Microsoft Dynamics CRM. Organizations are deploying Dynamics CRM with these benefits:

- A centralized system of leads, accounts and opportunities connecting information across the group
- The ability to track and evaluate opportunities through forecasting, opportunity size and likeliness to close
- A tool and user experience that allows sales people to efficiently manage their workday
- Automated manual business tasks and processes using workflows
- Easy adaptation to the growth of your business

Deployment options

Dynamics CRM can be implemented on several platforms based on your specific needs:

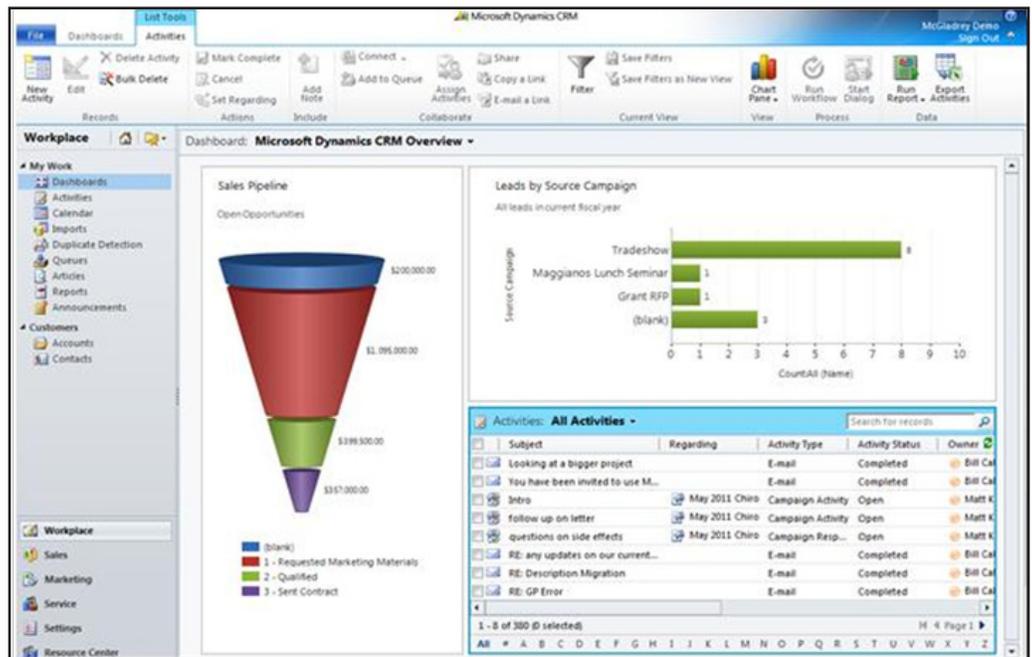
- **Microsoft Dynamics CRM Online** hosted by Microsoft. This option is affordably priced and easily deployed. This platform is available for a 30-day free trial.
- **Private Cloud Services**, priced per user per month by McGladrey. This provides a secure, maintained platform with data backup and disaster recovery without costly hardware investments or the hassles of managing equipment.
- **Microsoft Dynamics CRM On-premise**, installed on your own server. McGladrey helps you design and plan your custom deployment.

How SmartStart can benefit your organization

McGladrey consultants have deep experience implementing CRM systems and automating sales processes. Working across a range of industries and market sizes, we have identified critical objectives our clients are looking to achieve. We used this information to design the SmartStart program and help clients quickly realize the value of CRM.

The SmartStart program includes:

- Identification of short-term goals, long-term vision and priorities surrounding your company needs
- Training on best-practice processes for sales automation and pipeline reporting
- Configuration of the application to meet your unique business requirements
- Workflow to automate key processes
- An accelerated implementation schedule to get you up and running quickly
- A CRM application that is pre-configured with features required by most organizations



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