

# » CRM Kickstart

## Your CRM journey starts here

## An Introduction to CRM Kickstart

CRM Kickstart is designed to help organisations start their CRM journey – quickly, and at a low cost – adding value immediately.

There are literally thousands of ways that Microsoft Dynamics 365 CRM can be configured to suit businesses of any type, from small and medium business, through to large corporates and enterprises.



This can be a two-edged sword for a small business. For those starting out, the choices can be overwhelming, especially with little or no experience in what CRM can do. But as you gain experience, the opportunity to uncover and include other features that can help your business is enormous.

**CRM Kickstart helps to overcome the initial challenges, and in time, unlock the future potential of how CRM can contribute to the ongoing success of your business.**

CRM Kickstart is a baseline configuration of Microsoft Dynamics CRM which, from our experience, represents best practice for small business in the areas of Sales, Customer Care, Marketing and optionally, Post-sale job tracking.

## What is CRM Kickstart?

Microsoft Dynamics CRM is one of the most feature rich and scalable CRM solutions in the market. CRM Kickstart, powered by Dynamics CRM, provides all the advantages of a powerful and proven CRM solution, without the cost and lengthy process of an enterprise level customisation.

We have identified what a typical small to medium business needs to manage sales, cases and marketing, and have pre-customised these features in a baseline configuration of Dynamics CRM – CRM Kickstart.

But it can't end there. To make CRM suit your unique business and set you up for success, some additional customisations are needed. We ask you a series of questions about your business and how you work, so we can tailor your CRM Kickstart solution to suit you. They're not hard questions, but they're designed to tease out the important factors that will mean your CRM adds value immediately. For example, we ask you:

- The types of organisations and people you do business with
- How you might classify and categorise your customers
- What data is important to capture during interactions
- How you would progress sales activities through your business, etc.

Then we customise your CRM accordingly.

Of course, over time you will want to continue to change and adapt your CRM to suit your changing needs. We can help with that too.

## Who is CRM Kickstart for?

CRM Kickstart is for small to medium businesses (SMBs) that want to kick start their CRM journey, and quickly realise the benefits that a CRM will bring to their growing business.

Most likely you will not have an existing CRM, and have been using Excel, paper, or other methods (such as your finance solution or email marketing tool) to store your customer information. But you're beginning to be frustrated by the limitations of what you're doing. These approaches work for a while, while you're small, but don't scale well as your business grows. Your business needs a CRM with:

- All of your customers in a "single customer view" so that everyone in the business that interacts with customers can quickly see customer information and history
- Consistent approaches to capture and drive interactions so that all staff will follow your correct process (whether it be for sales, customer service or marketing)
- The ability to easily integrate with your Outlook and other Microsoft applications for email and calendar (to share calendar activities and to-dos, linking to emails, etc)
- The ability to interact through simple marketing communications with your customers.

CRM Kickstart services are competitively and realistically priced for small to medium businesses.

For a complete list of what's included, please [contact us](#).

## Can I add other capabilities to CRM Kickstart?

Although extensive, and suitable for many small businesses, CRM Kickstart may not provide 100% of your CRM needs – that's ok - we can include additional customisations on top of your CRM Kickstart, now or down the track. Some additions may be small, or they may be larger depending on your unique requirements. For example:

- Additional fields, dashboards, business processes or workflows
- Unique workflows (authorisation steps, escalations or alerts)
- More complex business structures or security model
- Integration with a specific 3rd party solution or software, such as: finance, reservations, other email/marketing tool, event management etc.
- Inclusion of a portal to allow customers or partners to interact with CRM data
- Complex data migration (e.g. from an existing CRM solution, another finance solution, or multiple and varied Excel spreadsheets etc)

We'll need to understand the scope and then cost these additions. Depending on the size, priority, dependencies and scope of any additional customisations, we may agree with you to bundle the additional capabilities into CRM Kickstart at once, or plan a phased approach and add over a period of time.

## Keeping your CRM relevant with Kickstart Success

CRM is a journey, and CRM Kickstart is designed as a base for you to continue to grow and evolve as your business grows and expands, and be a part of your business success.

When you sign up for CRM Kickstart, you also sign up for a *Kickstart Success* assistance package of your choice. This gives you a chosen number of hours per month to access assistance from us (min. 1 hour per month).

From our experience, every business needs access to ongoing assistance as a critical part of their success with CRM, which is why we have made *Kickstart Success* subscription a compulsory part of the Kickstart program.

You choose how many hours per month (with a minimum of 1 hour per month) you'd like to access our expertise for:

- Ad-hoc email or telephone support for ongoing advice, assistance and guidance to ask those simple or more complex questions about using your CRM;
- Planned support to keep your solution continuing to evolve as your business grows and changes:
- Refinements and tweaks (add a field, change a business rule, change a report or view) that might take minutes;
- Enhancements (new workflow, new report or form, import new data) that might take hours.

As you add more team members you may find you need different team structures, business processes will evolve with more steps, you may want to automate workflows (escalations and alerts). More customers may mean you need different sales teams, additional fields, or metrics to measure your business. Or you just need someone to call for advice and guidance.

As a monthly subscription, you won't need to think twice about making the necessary changes to your CRM.

*Kickstart Success* gives you the flexibility to plan how you will use your *Kickstart Success* hours, while being able to fund it from your cash flow. It gives you the peace of mind that there's always help if you need it.

## Next Steps

To view an introductory video of CRM Kickstart, please [click here](#).

To discuss how CRM Kickstart could work within your business, please contact Beyond CRM on:

- Call 1300 014 319
- Email [kickstart@beyondcrm.com.au](mailto:kickstart@beyondcrm.com.au)
- Visit [www.beyondcrm.com.au](http://www.beyondcrm.com.au)

## About Beyond CRM

At Beyond CRM, we are a team of Australian based CRM experts that specialise in Microsoft Dynamics CRM for small to medium businesses.

We get our satisfaction from helping people and making a difference within our clients' businesses. Our solutions aim to empower your people with simple efficiencies that drive major improvements in the way you operate.