



CLOUDSCAPE
ELEVATING BUSINESS THROUGH THE CLOUD

Edition 4



FAST TRACK CRM IN A BOX FOR SMALL AND MEDIUM BUSINESSES: HOW TO QUICK START DIGITAL TRANSFORMATION

IN THIS ISSUE:

- Liam O'Brien, Microsoft Dynamics 365 Specialist at Westcoast Cloud, examines why Digital Transformation is attractive to small to medium sized businesses and explains a proven Fast-Track CRM approach to make it happen.
- Westcoast Cloud has partnered with Cloud9 Insight to help you offer an agile, light-phased approach to CRM
- The solution is based on the Microsoft Dynamics 365 platform for fast deployment

Worldwide investment in digital transformation initiatives is expected to reach \$2.2 trillion this year, up by 60% since 2016.* So what is it and why is it so important to our customers?

It's not an entirely new concept. After all, we've been using digital technology to transform the way we work for decades. What's changed is that companies are now applying digital transformation at a process level, integrating the latest digital technology into all areas of the business to fundamentally alter the way they operate and deliver to customers.

You can see the attraction. Taking processes that are manual and time-consuming, and putting an automation in place not only gives you greater efficiency, it also provides competitive advantage and adds value to your business.

It allows you to improve customer experience and trust, as customer journeys can be tracked, and automation set up to ensure they receive the most cohesive experience possible. It also allows for a higher skilled, easier-to-retain workforce, as training becomes easier and employees are more engaged with less repetitive work.

In short, digital transformation presents exciting opportunities to engage customers, empower employees, optimise operations and transform your product. And the small to medium sized businesses we serve are becoming increasingly aware that they need to adopt it – just as their competitors are – or fall behind in their industry.

THREE EXAMPLES OF DIGITAL TRANSFORMATION AT WORK

To achieve new flexibility – by transferring on-premise databases to online cloud data, staff can work at home if needs be. Also, time-restricted activities can be elevated from staff with scheduled and automated workflows.

To gain greater efficiency – replacing manual processes such as lengthy spreadsheet data entry with automated workflows delivers quality data faster, and frees up staff to spend more time on other areas of their role.

To increase revenues – by using digital transformation to improve business models and discover new sources of revenue in customer engagement. CRM tools can be used to extend the customer experience and their value.

WHAT IS CRM? AND WHY CLOUD CRM?

CRM – Customer Relationship Management – is a strategic system that enables you to keep track of existing and potential customers. Using a cloud-based CRM system ensures a secure, scalable system that can be implemented quickly.

SMBs CAN BENEFIT FASTER

How you implement digital transformation depends on pace of change, budgets, and desired capability. Large companies are more likely to take a highly strategic approach that involves pulling together multiple applications and stakeholders across various departments. Thankfully, our small and medium sized business customers can be more agile. They can take a light-phased approach, deploying CRM software for a set of core users within a particular line of business such as sales, marketing or service. In other words, Fast Track CRM.

This can be as straightforward as purchasing a cloud licence and then putting applications to work. Microsoft Dynamics 365 and its CRM add-ons can be quickly adapted to suit unique company requirements, to address immediate needs and align bespoke processes. It's easy to plan for further phases to mature the solution to deliver a longer term roadmap.

The advantages of Fast Track CRM:

- Fast deployment (from a 14 day delivery for requirements to training)
- Perfect for small teams with one core business process (Sales, Service or Marketing)
- Ideal for a working proof of concept
- 1 day on-site training
- Knowledge transfer to help you be self-sufficient
- Ongoing membership support and training contracts available (additional charge)
- Best practice advice about sales, marketing and service processes to ensure the highest ROI
- Offers the functionality to support your business process
- Fixed, low budget phase 1
- Flexible licence and membership support agreements offered on a monthly rolling contract

* IDC FutureScape report.
<https://www.businesswire.com/news/home/20161101005193/en/IDC-Sees-Dawn-DX-Economy-Rise-Digital-Native>

THE IDEAL PLATFORM TO START

Microsoft Dynamics 365 is an unmatched platform for digital transformation. Firstly, because it allows SMBs to transform processes one careful step at a time, as they move forward on their digital transformation journey.

As this crosses business functions, Dynamics 365 easily adapts. Purpose-built cloud apps work together seamlessly to manage business processes across Sales, Customer Service, Field Service and Project teams.

Dynamics 365, as a platform, removes the barriers between data, business processes and people by unifying ERP and CRM capabilities. It's deeply integrated with PowerBI, Cortana, Sharepoint and Office 365. Additional modules are available after implementation for other business functions, such as field services, finance, sales, marketing, talent and project service.

Dynamics 365 also lends itself particularly well to the strategic benefits of digital transformation, giving managers the insights that they need to make the right decisions at the right time. Reporting and business intelligence needs are supported so you can anticipate the needs of your customers, identify new opportunities and bring new products to market in less time. Because all critical aspects of the business are seamlessly connected, collaboration is facilitated, all departments can work from the same single view of the data, customer relationships can be strengthened and the company can be more agile than ever due to automation of many business aspects.

As Microsoft partners and experts in Dynamics 365, Westcoast Cloud together with Cloud9 Insight are ideally placed to assist small and medium businesses that are looking to digitally transform. If a business is new to cloud technology, our expert staff can talk them through the advantages, and handle the implementation on your behalf. Our relationship with Microsoft allows us to provide the latest and greatest software at the best prices, as well as all the support you need to be comfortable with every step of the sales, delivery and support cycle.

**Ready to sell Fast Track CRM?
Contact Westcoast Cloud to
see how we can make it work
for you and your customers.**