

Professional Services

BENEFITS

SUMMARY:

Customer profiles that allow you to capture client information at every contact point, helping them build strategic customer knowledge and insight over time.

Campaign management supported by real-time messaging, built on efficient customer segmentation and automated marketing lists.

Data warehousing and business intelligence that provides decision makers with fast, deep access to the customer profiles and information, needed to plan and develop successful strategies that increase revenue and return on investment.

Automated workflow and business process management that enables you to efficiently capture and monitor opportunities.

Integration of all business units, into one platform which significantly reduces IT costs for business process automation and connects the entire organization.

Connected, consolidated data and systems that provide comprehensive information about the opportunity and its related proposals

Management functions and tools that drive smart decision making based on deep visibility into integrated customer data

*DASHBOARD-Start up-Default screen
For the Management*

*Forecast can be drilled
Actual records to see individual contribution
by Customer/Prospect/Consultant/Sales Person
and by Product*

Professional Services for Microsoft Dynamics CRM

Business Challenge

Professional service firms—law firms, financial services firms, money management firms, private equity firms, hedge funds, management consultants, advertising agencies—are the most challenging and exciting organizations to lead. But lately the challenges for professional service firms (PSFs) have been growing in size and complexity, and the excitement is more the type for which you need a dynamic and vibrant system, to help you take control of it. With no effective contact management and thousands of documents to manage, nightmares come calling that would require an IT Strategy to keep services providers ahead of their time that would help change business models on the fly.

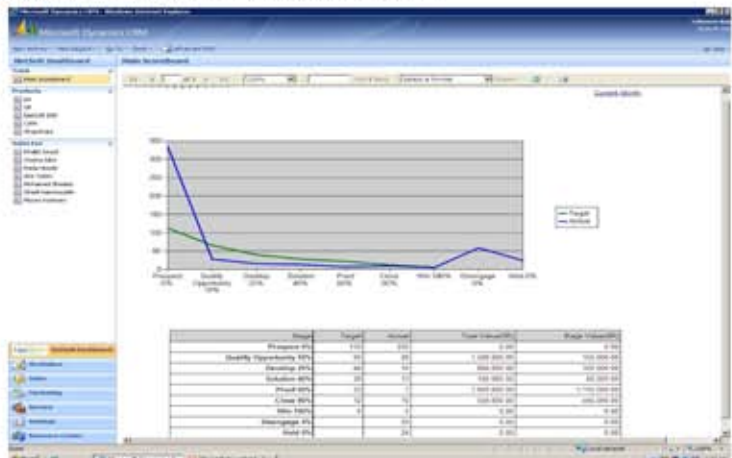
Solution

CapsLock has developed a Professional Services Solution using Microsoft Dynamics CRM 4.0 that integrates seamlessly with SharePoint to support Proposal Management in terms of document managing. A manageable, easy to use, and affordable Professional Services Business Solution, system tailored to companies that are into and provide services to customers. The solution functions as sturdily and is as multidimensional as a Swiss knife.

It is so strong that it has the capability to become the third in line most powerful systems of all time after phone and email. In reality, its ability to integrate with the first two systems makes it as razor sharp as a samurai sword.

The solution provides an intuitive way for Professionals offer services to customers and partners and capture critical customer specific information. The solution ties-in all of Professional Services business requirements, like Lead Information Capturing, Opportunity Information, auto updating of sales stages, Allocation of percentile weights based on opportunity development, integrations with IVR etc. into one central location, vastly improving access to real time data.

The solution automatically equips workers with the exact data and form needed for each incoming (or outgoing) call from (or to) Customers to capture and respond case/ticket related information for after sales support activities. These are integrated via a powerful Workflow Engine that is an integral part of the CRM solution.





Benefits

An integrated approach using Microsoft Dynamics CRM and SharePoint effectively resolves the contact and document management system issues.

Business Intelligence lays its foundation by interfacing both MS CRM and SharePoint that improves the pipeline management process.

Design intelligent interaction strategies to know what to sell, when, and to whom, and when to talk and when to listen.

Make every interaction count by holding intelligent conversations, making relevant suggestions, and delighting customers by showing an intimate understanding of their current and future needs.

Respond to change by implementing new campaigns and customer management strategies and ideas quickly and consistently, and by responding in minutes to changes in the market, the competition, product offerings, and customer needs.

Delivering superior sales and service requires a complete, multi-channel view of the customer that provides insight on how to meet both service and sales needs. When this happens, all customer-facing staff, whether they are mobile staff or channel partners, working within agencies or brokerages, or servicing contact centres, can gain full knowledge of their customer's service and product needs, while management gains actionable insight into these producers.

FEATURES

A complete CRM suite that leverages the power and productivity of the Microsoft platform

Works the Way You Do:
Native Office and Outlook experience
Full range of mobile solutions

Works the Way Your Business Does:
Easily adapts to each company's needs
Powerful workflow and analytics

Works the Way Technology Should
Easily adapts to each company's needs
Powerful workflow and analytics

The Professional Services Solution is truly an application that is designed for the "rubber to meet the road"

