



## **DYNAMiCS** **iT**

Dedicated CRM and Project Management technology for IT departments, providers, resellers and telecom companies.

Manage Sales, Marketing, Customer Service and Project Management in a single system.

## Introduction

If you are a technology company looking for a dedicated CRM and project management solution then Dynamics-IT from Tiski Dynamics is for you. Powerful Microsoft Dynamics® CRM functionality coupled with easy to use project management capabilities mean that, as a technology company, department or provider, you have the perfect solution for the management of sales, marketing, customer service, project management, consultancy and implementation.

With Dynamics-IT you not only get a CRM and project management solution that is specifically designed for your industry, you will also benefit from our Rapid Deployment Process, access to your own dedicated Customer Success Engineer, and affordable monthly user costs. There's no need to worry about being stung by costly upfront expenses before you've even had chance to benefit from the system.

# **DYNAMICS** IT

## What is Dynamics-IT?

Dynamics-IT is a joint CRM and project management software solution that is designed specifically for use throughout the IT industry. The solution incorporates the tried and tested functionality of the award winning Microsoft Dynamics CRM solution with a specifically developed project management module.

With Dynamics-IT you have everything you need to manage the entire customer acquisition and management process in a single, easy to use system:

- Plan, manage and monitor marketing campaigns
- Effectively manage opportunities and the sales pipeline, ensuring that a higher percentage of sales enquiries are converted into customers
- Manage multiple projects, from the implementation of technology products, to the development of specific technology solutions for your customers
- Service your customers effectively in line with their individual SLA and support requirements.

## Who is Dynamics-IT for?

Specifically designed for the IT and telecoms industry, Dynamics-IT is the perfect fit for managing the marketing, sales, project planning and implementation, and customer service processes for:

- IT and telecoms service providers, consultants and resellers
- Internal IT departments
- Technology developers and providers.

## What are the Benefits of Dynamics-IT?

Dynamics-IT offers technology companies a number of key benefits across their main operational teams, sales, marketing, customer service, consultancy, product implementation and training.

- **Build, automate and manage key internal processes** – manage customer acquisition and relationships, from first point of contact with your organisation to implementation and ongoing customer service; all in a single system.
- **Report across sales, marketing, customer and internal projects, and customer service easily** – make decisions based on the bigger picture and accurate data and information.
- **Plan, manage, and monitor marketing campaigns across single or multiple products and services, and throughout the entire sales pipeline.** Maximise the effectiveness of your marketing budget and the resource allocation of the marketing team; increase the quality of enquiries being handed over to the sales team. Support sales with easy access to supporting information and documentation.
- **Improve sales opportunity management** - get access to enquiries for follow up as soon as they are available, allocate enquiries to the relevant member of the sales team, manage and monitor the sales pipeline, and identify bottlenecks in the sales process. Use interactive dashboard reporting to monitor the sales pipeline; drill down to product, service and individual level. Hand over to the project implementation and customer service teams easily.
- **Plan and manage projects** - allocate resources across teams, record accurate billable hours and expenses, utilise information collected by sales, marketing and customer services. Ensure that projects are delivered on time and to budget and identify opportunities for additional billing which may have been missed previously. Hand over to the customer services team easily once the project has been signed off.



## Dynamics-IT Core Features

### Sales

- Opportunity management - task and appointment management, production of proposals and quotations, store company and contact details, see how your opportunities have responded to marketing campaigns; store documentation, details of communications and emails against the relevant opportunity
- Dashboard reporting – view the entire sales pipeline and provide forecasts for sales turnover manage and monitor sales team performance, identify reasons for loss, and more
- Build, customise and automate sales processes based on your organisation's requirements.

### Marketing

- Plan and review your marketing – build your marketing calendar, allocate budget and resources, and set tasks
- Manage and monitor individual campaigns - report campaign performance and use results to improve on future campaigns
- Forecast expected campaign response and set benchmarks
- Link to external systems, such as third party HTML email platforms
- Log marketing spend and expenses against your budget allocation
- Store relevant information and documentation for use by the sales and customer service teams.

### Customer Service

- Store SLAs and details of support requirements against the relevant customer
- Open support cases through multiple channels, such as phone and email
- Track case activity against SLAs to ensure that support offered is in line with the agreement
- Pick up existing cases easily using the information stored within Dynamics-IT.

### Project Management

- Plan, monitor and manage the time, costs, resources and progress of each live project using the integrated Gantt Chart and expense management functionality
- Set up new projects quickly and easily using pre-defined project templates
- Track, manage and escalate tasks
- Log and monitor chargeable time and expenses easily within the same system - bill customers accurately and on time using integrated invoicing
- Get an instant and real time view of your live projects through the interactive project management dashboard.



## Why Tiski Dynamics?

Tiski Dynamics is one of the UK's leading Microsoft Partners and we work closely with them to ensure that the technology and telecommunications industries are getting everything that they need from Microsoft Dynamics® CRM. We are not only experts in Microsoft Dynamics CRM, we also pride ourselves on our depth of knowledge on technology and telecoms companies and their requirements; our knowledge and expertise are unrivalled in the marketplace.

- **Rapid deployment processes** – through the established processes we have put in place, you will be up and running and benefiting from Dynamics-IT fast (often within 90 days).
- **Dedicated support** – you will work with one of our experienced Customer Success Engineers throughout your implementation. By getting to know your objectives and expectations they will drive your implementation, training, and the successful adoption of the system internally from day one.
- **Affordable monthly user cost** – one of the barriers to organisations purchasing the CRM and project management solutions that they require is the upfront implementation cost. At Tiski Dynamics we have done away with this, all you pay is an affordable monthly cost per user.
- **Customer success programme** – we understand that the success of a new business critical system comes from much more than the implementation. That's why we have developed a customer success programme with a focus on user adoption and embedding Dynamics-IT into the day to day running of your organisation.

## 30 Day Free Trial

We are so confident that you will benefit from using Dynamics-IT that we are offering you a free 30 day trial. Guided by the Tiski Dynamics team, you will experience first-hand the benefits offered by a CRM and project management solution that is specifically designed to make it easier for your sales, marketing, project implementation and customer service departments to operate in your industry.

Sign up at  
**[www.tiski-dynamics.com](http://www.tiski-dynamics.com)**  
or speak to a member of the team on  
**0247 7712050**



### Implementation and Training

We want you to be up and running and reaping the benefits of Dynamics-IT as quickly as possible. That's why at Tiski Dynamics we have developed the Rapid Deployment Processes, we have said goodbye to the often long and difficult processes other CRM providers use. You will be allocated a dedicated CRM and project management expert and Customer Success Engineer who will work with you on your system implementation from day one. Your Customer Success Engineer will take you through a tried and tested 4 step process:

## STAGE ONE: SCOPE

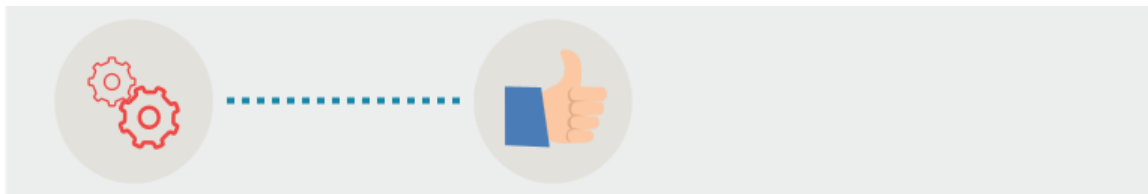


You choose the Key Business Drivers that the project will focus on

Together we walk through a customised solution for your industry

We agree your configuration and data migration requirements

## STAGE TWO: CONFIGURE



We configure your system to meet your requirements

We review the configured system together to make sure you're happy

## STAGE THREE: MIGRATE

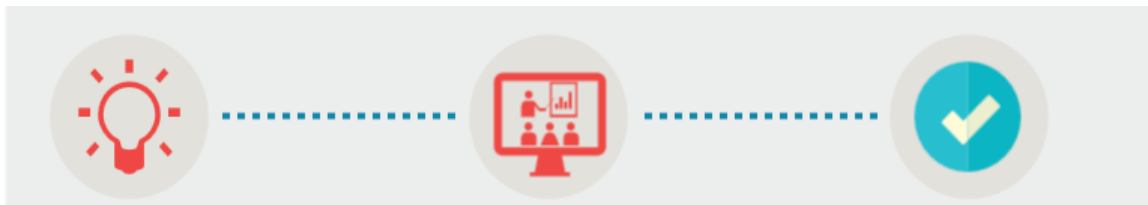


We create data migration templates for your system

You add your data to the templates

We migrate your data into your new system

## STAGE FOUR: TRAIN



We agree a training schedule for your users

Your users attend live web-training sessions on your new system

Your users are ready to go-live with your new system



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