



# KPMG Flash CRM for Microsoft Dynamics 365

**Enabling small and medium businesses to gain sales pipeline visibility, manage and retain customers and accelerate growth.**

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[KPMG.com/au/Microsoft](https://www.kpmg.com/au/Microsoft)



# KPMG Flash CRM is built on Microsoft Dynamics 365, delivering



## Account Management



## Contact Management



## Sales Opportunity Management



## Tracking of appointments, interactions and activities



## Sales Dashboards

When you choose KPMG Flash CRM, a KPMG CRM consultant will deliver the fixed scope and fixed price solution over 7 days of effort, giving you a low cost, out of the box solution that meets the needs of your business.

It can be implemented in as little as 2 to 3 weeks, giving you the time to properly plan your requirements, review the outcomes and organise staff for training.

With the growing number of affordable, cloud products on the market, more and more small and medium businesses are looking for CRM software to manage interactions with both current and prospective customers.

Many businesses are seeking to upgrade from basic contact management systems so they can benefit from the range of capabilities for sales, marketing and customer support.

In response to this, KPMG have developed KPMG Flash CRM for Sales, specifically for small and mid-market organisations at a fixed price.

If you are looking to:

- get visibility into your sales pipeline by sales stage
- collaborate with your sales team and get 360 degree view of your customers
- track interactions with your customers – emails, phone calls, meetings etc
- implement best practice and a consistent approach to managing sales opportunities across your business
- gain insights into your business with flexible reporting

KPMG Flash CRM is the solution for you.

KPMG Flash CRM is an accelerated fixed scope approach which allows organisations like yours to get started using Dynamics 365 CRM Sales quickly.

You get the data and Infrastructure needed, which is hosted in Microsoft Azure, so you have no infrastructure costs and 99.9% uptime guaranteed.



# Why choose KPMG Flash CRM – the benefits

- Gain visibility into your sales pipeline and track opportunities through the stages. See data such as estimated revenue, estimated closing dates, probability, sales lead and more.
- Gain visibility into your accounts – capture key information related to businesses, including Name, Address, ABN, Relationship types and more. And capture all your contacts at the accounts with fields like name, address, job title, and contact number.
- Improve your customer service and share knowledge of your customers internally with visibility into customer interactions and next steps.
- Make more informed decisions with data insights grouped together in meaningful dashboard views, e.g. sales pipeline, sales leader board, top opportunities, top customers and more.
- Get a world class, affordable CRM solution implemented at a fixed price.

## How we implement KPMG Flash CRM

### The following activities are included in the fixed price implementation cost

- **Project Planning:** confirmation of the scope and setup, agreement of the required commitments and timelines.
- **Solution Overview:** demonstration and discussions on the CRM sales functionality included.
- **Data Migration:** KPMG will provide templates for you to populate your data, which we will then migrate into Dynamics 365.
- **Solution Workshops:** working with you, we will capture minor adjustments around Accounts, Contacts and Opportunities to suit your business requirements.
- **Conduct User Training:** work together through real life examples of your sales opportunities, activities and functions.
- **Conduct User Acceptance Testing:** confirm the system is performing as expected.
- **Go-Live:** complete final checks before the system is released to users.
- **Project Closure:** confirm no outstanding issues are to be resolved or tasks to be completed.

Additional Services available: integration with Wiise; Active Directory single-sign, additional dashboards, quote and sales order functionality, further training and data migration.

## Get CRM in a flash with KPMG ...

### Find out more

To talk to one of our specialists about KPMG Flash CRM and how we can help you address your business needs email [dynamics@kpmg.com.au](mailto:dynamics@kpmg.com.au) or call 1300 197 960.

## Next steps: Talk to us

For more information on KPMG Flash CRM go to our webpage [kpmg.com/au/microsoft](http://kpmg.com/au/microsoft) or contact one of our specialists and see how KPMG Flash CRM can help address your business needs. Email [dynamics@kpmg.com.au](mailto:dynamics@kpmg.com.au) or call 1300 197 960.



2017/2018 INNERCIRCLE  
for Microsoft Dynamics

## Why work with KPMG

KPMG are a leading Microsoft Dynamics 365 Partner, who have successfully implemented over 1,200 solutions, helping companies make more informed decisions, drive down costs and implement systems smarter and faster.

KPMG has a strong focus on supporting small businesses and brings best practices and a wide range of industry experience within a small business budget.

KPMG are a Gold ERP and CRM Microsoft Partner and are a member of the Microsoft Dynamics Inner Circle.

## Contacts

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