Microsoft Dynamics Implementation, Consulting & Training Services

Attract more customers, achieve compliance and increase productivity.

Industry: Banking

Our team helped one of the nation's largest Banking firm with its CRM Initiative for the creation of *single customer view*.

By Creating single customer view across functional areas Vis a Vis Account Opening, Servicing, Problem Resolution (PIR), Legal and Compliance, the company was able to increase customer visibility across organizational boundaries, Improve user co-ordination, and eliminate organizational 'silos'

Microsoft Dynamics CRM offerings from Seepath Solutions create 360 degree view of your customers, partners & employees and enable you to align your business with the market effectively while reducing the Total Cost of ownership. Whether you are a small business or a large business enterprise, Seepath follows a process-driven approach to CRM deployment that will help you to achieve a return on your investments. Designed specifically for small and medium businesses, our ***QuickStart service package*** *will get your Dynamics CRM application up and running in fewer than 4 weeks.*

Business Process Review & Re-engineering (BPR):
During this initial stage of the engagement, our team will investigate the legacy business processes, policies and procedures in order to streamline the workflow for organizational effectiveness and productivity. Depending on the functional areas such as Sales, Marketing and / or Customer Service that the company wants to automate, business process requirements are reviewed and updated to reflect the business need. Legal and regulatory compliance requirements are also validated during this phase.

Use Case:
Following the BPR review, system specification documentation will be created which will address the workflow scenarios such as "*who does what*", escalation policies, alerts and procedures as well as reporting metrics. Use Case "Walkthrough" will be conducted with the business & Technology team to ensure that requirements are captured as needed. Based on the use case document, the CRM tool will be configured for workflow, dashboard and reporting as supported out-of-box. Such systemic processes helped one of our customers, the nation's largest banking firm, to increase co-ordination across Business Units, eliminate organizational silos and comply with regulatory standards.

Customization:
The functionalities that are not supported out-of-box are addressed through customization initiative whereby the product functionalities are extended through custom programming as supported by the CRM Technology to meet the business need. Depending on the choice of the CRM tool, our team can extend out-of-box functionalities.

Industry: High Tech

Our team delivered training on a *Workflow tool* to a worldwide user base (customer Service team) for two of the nation's leading hi-tech firms during their merger.

We built a team of CRM Product SMEs and developed training materials customized for specific work groups. The training was delivered online to a user base of 3000+ across EMEA, NA & Asia Pac regions over the course of several months to bring the CS teams up to speed on the CRM Workflow functionalities that significantly improved user co-ordination

Integration (MS SharePoint, SAP, Oracle, IBM & legacy systems):
For e.g. Integrating CRM tool with PDA (iPhone, Blackberry) allows mobile employees access to the trouble ticket cases on the go. Depending on the scope of business need, connecting CRM tool with ERP, mainframe and or legacy systems can be a great benefit. By synchronizing customer records between order management (SAP) and customer service (CRM) near real-time helped one of our customer (leading Telecom Company in NA) to improve the customer service by over 40%. We utilize industry leading products from *Informatica, SAP Business Objects and Tibco.*

Reporting & Dashboards:
Legacy reports are reviewed to get an understanding of the reporting need. Additional reporting requirements are captured during the BPR phase of the project. The product is configured to enable user to run reports based on the requirements. Any reporting capabilities that are not supported out-of-box will be custom developed as part of additional customization.

Training & User Adoption:
Depending upon the implementation of the product (SFA, Mobile, and Customer Service), our team will create a detailed training curriculum to ensure that the users are well trained on the product functionalities. For one of our customers, a leading investment banking firm, we customized a training program where by our team conducted training in batches of 20 users over several months that ensured that users of all five business units are up to speed with CRM processes, procedures and product functionalities.

On-demand and / or On-Premise Implementation:
According to Gartner, a leading research firm, by the year 2010, 30% of the new software will be delivered via S-a-a-S (Software as a Service). From *on-premise* to *on-demand* implementation, Seepath can lead the enterprise transformation to cloud computing that can speed products and services to market while significantly reducing the TCO. Seepath is currently helping one of it's customer to develop products by leveraging cloud computing model.

Microsoft Dynamics Consulting QuickStart Service

QuickStart Service: *Designed for small-business customers with fewer than 50 users, QuickStart package will address the requirements of your single most important business process. Our business analysts will work with you to map solutions that address your problems and accelerate the appropriate solutions in a span of 3 – 4 weeks*

Whether you're a new customer who wants to get off to the best start possible, or an existing customer looking to make the most of unused capabilities, QuickStart service provides an expert assistance with the initial application setup to support your critical business processes.

Key Benefits

- Realize dramatic improvements in a short period of time
- Create a road map to help you meet future business needs
- Achieve high end-user adoption and more efficient use of your CRM investment
- Get the knowledge you need to help you implement or further optimize your solution
- Implement metrics to help measure and manage your business

Deliverables:

This QuickStart service includes the following deliverables based on the priorities identified by customer and Seepath Solutions.

- BPR (Business Process Review) workshop to analyze the business requirements and create use case document that address key business functionalities. (up to 1 week)
- A Solution Design workshop, Deployment & Training (2 - 3 weeks)
- Users & Privileges: Set up Users and User Roles
- Set up Contracts, Subject Tree and Queues
- CRM Application configuration based on the priorities identified by customer and Seepath Solutions
- Outlook Integration Options
- Data Mapping and Data Import for Accounts, Contacts and Leads (Basic Level)

Note that QuickStart services are not designed to support advanced deployments, complex workflow, data migration, or complex reports and dashboards.

Consider this service if:

- You want a faster return on your CRM investment
- You want to achieve high adoption rates
- You want to define and implement metrics to track performance

Pricing & Timeline:

- 3 - 4 weeks

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