



# AdvancedCRM

## Our Credentials

*Successful CRM. Delivered.*

Microsoft Dynamics

PEOPLE. PARTNERSHIP. SOLUTIONS.





## Why choose AdvancedCRM?

Building on the experience of over 200 CRM implementations, both on-premise and online, we bring a perfect-fit to your deployment. Our pre-delivery transparency, our well defined delivery processes and our project management expertise all help clients to remove the risk from their implementation, and tackle the project in a realistic, pragmatic fashion.

A CRM solution is not like a back-office transaction system that just churns away in the background. It needs to constantly adapt and evolve with your front-office activities, your routes to market, your sales and marketing processes and the evolving ways you interact with clients and prospects. This is why we have a focused Client Services Division, to ensure you have access to all the products and services you need to support and progress the development of your CRM system.

This service goes way beyond typical account management. You will have available to you a team comprising technical support, a training resource, an account manager, the client services director, a CRM success consultant for review and advice, and a pre-sales consultant to keep you up to date on the product roadmap. Through this team and regular reviews, we will help you to optimise your CRM solution over the long term.

### AdvancedCRM is your partner of choice, as we have:

- > Capable staff and expertise through the implementation process
- > A dedicated Client Services Division, there to serve you once the system is in place
- > Time and money saving add-on products, modules and templates

### Quality and Microsoft Pedigree

AdvancedCRM has worked with the Microsoft CRM solution since its launch in 2004 and enjoys a great working relationship with Microsoft's senior team as a strategic Tier 1, Gold Certified CRM Partner. This accreditation has to be earned annually and is specific to the CRM competency. It reflects Microsoft's independently audited customer satisfaction in our client base, measurement of our technical competence, and adherence to best practice implementation process. In addition, we hold further quality accreditations including ISO 9001 and ISO 27001. Clients also benefit from our own Partner Advantage support with Microsoft, which provides an additional layer of technical expertise when needed.

# Finance Sector

Corporate Finance | Investments | Insurance | Banking | Factoring

## Jupiter Asset Management

Tracking private and institutional investor relationships, on-boarding process, relationship parties, SharePoint integration plus integration to client account holding information systems.

## Charles Stanley

Recording interaction with clients for an online service, and providing a consolidated view of each customer's holdings. This allows client services to deal effectively with queries and requests raised.

## AnaCap Financial Partners

Tracking deal flow, investor relationships and management reporting across multiple funds within this private equity firm.

## Royal Bank of Canada Investor Services

Deal pipelines, dashboards and contact management for an international sales force in multiple countries.

## Clearwater Corporate Finance


Managing the deal life cycle for both buy-side and sell-side activity, with referral management and targeted marketing.

## Altium Capital

Consolidation of the business contacts and activity tracking across multiple European offices, providing greater insight into relationships across the business.

## Bibby Financial Services

Commercial Finance, invoice factoring business development, multi-country deployment, sales process management, integrated transactions with roll-up reporting and SharePoint integration.

The background of the slide is a dark, textured image featuring a financial market chart. A prominent yellow line graph trends upwards from the bottom left towards the center. To the right, there are several vertical columns of numbers in yellow and white, including '0.7779', '94.4800', '0.6598', '0.9483', and '1.0160'. The overall aesthetic is high-tech and data-driven, with a diagonal orange-to-white gradient overlaying the top right portion of the image.

"Most large organisations have multiple touch points with the customer and by joining up those various interactions they can gain real insight and improve the overall customer experience. AdvancedCRM provided us with expert guidance on what would best fit with our business and future requirements."

*Bibby Financial Services*

*Group IT Director*

# Professional Services

Consulting | Property | Membership | Media | Business Services

## Arup

Global construction design engineering. Bid management, workflow approvals and integrated project numbering across global regions. This provides centralised control and dashboard visibility, spanning a complex matrix of markets, services and disciplines.

## Remploy

Management of complex and confidential relationships across both the private and public sector, Remploy is able to handle sensitive data with confidence and implement Human Resource programmes which enable disadvantaged citizens back into employment.

## NESTA - National Endowment for Science, Technology and the Arts

Centralised management and tracking of multiple stakeholders and related parties, for the provision of investments and grants to support innovation in the UK.

## British Land

Tracking business relationships and interactions across the different business units, with appropriate security to allow confidential information to remain hidden when necessary.

## Hughes Ellard Property

Chartered surveyor activities providing full work-in-progress visibility, tracking of properties, jobs, fee earning activities, automated rent review alerts and SharePoint integration for document management.

# Professional Services

Consulting | Property | Membership | Media | Business Services

## Northcliffe Media - Local World

Tracking of newspaper advertisement sales across hundreds of users and multiple sites, integrated ad-booking system data driving focused telesales and field sales activity, with detailed management reporting.

## Gully Howard

Specialist advice and training for occupational hygiene with field based consultants updating CRM from mobile devices, training course tracking and resource scheduling.

## Orchid Cellmark

Tracking of DNA testing process for civil and criminal investigations, including complex relationship tracking for interested parties and evidence.

## Insolvency Practitioners Association

Tracking of memberships, subscriptions, event management, renewal dates and related member support activities for the association.

## Creative & Cultural Skills

Contact management and reporting facilities for a Sector Skills Council body.

# Manufacturing & Construction

Electronics | Defence | Construction | Automotive | Energy

## Mitsubishi Electric

Field sales solution supporting account management of key distributors for electrical products.

## Scania GB Trucks

Integration to dealer management, providing sales, marketing and service staff with automated warranty alerts per vehicle and business intelligence reporting. Further integration to tablet devices for mobile staff.

## Samsung

Management of relationships with partners who are component suppliers, with graded status tracking in their supply chain.

## Doosan

Selling internationally into the energy sector, tracking of high value sales opportunities and bids for the provision of fully integrated energy solutions focused on service, plant, turbo-generator, boiler and air pollution control.

## Otis

International lifts and escalator manufacturer. Integrated unit contract information, to better inform and drive sales, marketing and service efforts.

## Cobham Defence

Complex bid management tracking for surveillance systems, and tank communication equipment, deployed across UK and USA.

## Ultra Electronics

Tracking and management of bids for naval combat and optical systems, command and control systems.

## Day Group Aggregate

Construction project materials supply. Integrated logistics information providing field sales and inside sales staff with clear visibility of sales order history, to aid quote generation.

## Balfour Beatty

Customer Service tracking of road schemes and related queries from the public.

## Skanska

Tracking of construction project bids from initial lead to full opportunity, for general building services.

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"We heard through another Microsoft CRM customer about AdvancedCRM's reputation for strong support and the moment we engaged they proved their worth."

*Mitsubishi*

*Head of Business Systems*



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# IT Services and Telecoms

Hardware | Software | Network Infrastructure | Managed Services | Unified Comms

## Azzurri Communications

Sales opportunity management and forecasting replacing a previously inefficient spreadsheet process. Extensive pre-sales profiling for better targeting and campaign management. Integrated telephony for click-to-dial capability from CRM screens.

## Stone Computing

By integrating CRM with Epicor Vantage ERP system, achieved a single, accurate sales forecast containing highly complex order configuration. This allows more effective planning of equipment production for clients. Complete order-history visibility enables marketing and after-sales teams to communicate more effectively with customers.

## IRIS Software Accounting Solutions and Computer Software Holdings

Having used Dynamics CRM for managing their relationships with customers and partners for several years, IRIS Software Group needed to divest their business into separate organisations. AdvancedCRM provided the technical expertise to split their implementation, and its related processes, whilst upgrading both to the latest version of Microsoft Dynamics CRM.

## Phoenix IT

Following the acquisition and consolidation of several businesses, with distinctly different sales processes, Phoenix IT Group are able to gain a single, consolidated view of sales pipeline through role-tailored CRM. By using Microsoft Dynamics CRM to manage relationships, contracts and key IT data, Phoenix's clients can be confident that effective Disaster Recovery processes can be deployed for their business-critical systems.

## DCG - Data

As providers of subscription-based, data-continuity services, DCG deployed Microsoft CRM to meet a very specific sales model.

## Niu solutions

With a vast range of data management service configurations, from a wide partner community, Niu solutions needed a consistent way of monitoring sales opportunities. Microsoft Dynamics CRM allows them to quickly measure revenue from large volumes of small simple orders, to Enterprise-scale solutions in one simple sales forecast.

"The Azzurri team were in safe hands with AdvancedCRM. They've been great from day one – providing sensible, business-focused advice through the initial analysis phase, with first-class technical expertise through implementation and on into support."

*Azzurri Communications*

*Head of IT*



## About Advanced

Through our enterprise and market focused solutions we positively impact millions of people's lives through continually investing in our people, partnerships and own technologies to stay focused on our markets', customers' and their stakeholders' needs.

We enable our customers to drive efficiencies, savings and growth opportunities through focused, right-first-time software solutions that evolve with the changing needs of their business and the markets they operate in.

True partnership is the defining thing that makes us different from the competition.

## More information

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People. Partnerships. Solutions