Strategy 365

Enabling business growth

Grow your business with

MICROSOFT DYNAMICS 365
Quick Start Packages

Strategy 365 will help your business to quickly implement Microsoft Dynamics 365 Sales, Dynamics 365 Customer Service, or a combination of both, at a cost-effective, fixed price.

Why Microsoft Dynamics 365?

Small and medium-sized businesses often need a customisable CRM system that can integrate seamlessly with their existing Microsoft ecosystem, while avoiding spiralling costs and lengthy implementation timescales.

Cost-effective tailored solutions

Implement a customised system that fits in perfectly with your internal business processes without needing to change how your organisation works.

Built for Microsoft products

Unlike other CRM solutions, Microsoft Dynamics 365 connects easily with other Microsoft products (such as Outlook, Microsoft Teams and SharePoint), giving companies the opportunity to create end-to-end business solutions.

Scalable with your business

Businesses continually grow and adapt, and Dynamics 365 benefits from a range of modules which can be added on further down the line, when your business needs them.

With our range of fixed-price Dynamics 365 Quick Start packages, you can be up and running quickly with a cloud-based scalable CRM system - without worrying over the costs.

"With Strategy 365, they're not trying to pull the wool over your eyes. They listen and they're up-front and honest – that's what makes them streets ahead of the competition.

Managing Director,
Focus Finance Limited.

Why choose our Quick Start Packages?

We appreciate that for many smaller businesses which are used to managing everything via spreadsheets and manual processes, planning the jump to Dynamics 365 Applications can be a little overwhelming. Equally, larger companies looking to test the waters of a CRM product do not want a large outlay for what could just be a proof of concept.

With our fixed-cost Dynamics 365 Quick Start packages, you can choose from predefined options that suit your business size and requirements. We believe an organisation's digital transformation should be as cost-effective and straightforward as possible.

Each of our packages has been verified and approved by Microsoft and can be found on Microsoft AppSource.

Whether your organisation is focused on Sales, Customer Service, or a combination of the two, we have your needs and budget covered with our range of Dynamics 365 Quick Start packages. Continue reading to find out the key features.

Still unsure if our Quick Start packages are right for you? Call us on 01782 916920.

Microsoft Dynamics 365 Sales

Choose from our sales packages to engage more effectively with customers, keep track of your pipeline and win business faster. Gain a full view of prospects, keep data secure and gain automated, actionable insights to increase productivity.

Nurture your sales from enquiry through to order	**Effectively manage your sales pipeline and forecasts**	**Produce professional branded quotes**	**Close sales faster with actionable insights**
Identify potential sales and monitor lead source effectiveness. Track sales opportunities and orders to identify up-sell and cross-sell opportunities.	Guided business processes streamline the sales flow from start to finish. Gain a clearer picture and identify potential risks.	Generate and send PDF sales quotes with ease, with the help of product price lists that can be as flexible as you need them to be.	Set up reminders and notifications to ensure more deals are won and fewer opportunities are missed.

Sales Instant Start 365

Do you already have an in-house technical team or someone with previous knowledge and skills of the Microsoft Dynamics 365 platform? With our Instant Start 365 package, we will get Microsoft Dynamics 365 Sales set up using best practice, and your team can take it from there. This package is ideally suited to a business with in-house resources that can customise Dynamics 365 Sales, or for organisations that want to use the application out of the box.

Sales Rapid Start 365

This package is best for those who need to get up and running with Microsoft Dynamics 365 Sales as soon as possible. It includes a little bespoke customisation to suit your individual business, ensuring it is set up correctly. The Sales Rapid Start 365 package is also a good choice for anyone who needs to test-drive the features before adopting the solution more broadly. This package offers an affordable way to get started quickly with the basics, and is best for companies that do not yet have the budget to go the extra mile.

Sales Quick Start 365

Do you have a growing team that could benefit from a little extra help and training on how to get the most out of Microsoft Dynamics 365 Sales? This package includes a more thorough analysis session so we can determine your requirements and your way of working to create the best fit. It is also ideal for larger businesses wanting to implement a proof of concept before growing their platform further. This Quick Start option is also the only package that includes a training and testing session to ensure your team is getting the most out of Microsoft Dynamics 365 Sales and includes more bespoke customisation of the system.

Licence Options

Option 1: Dynamics 365 Sales Professional – £49 per user, per month

Option 2: Dynamics 365 Sales Enterprise – £71.60 per user, per month

Team Member (for light usage and read-only access) – £6 per user, per month

Prices shown are based on annual commitment. Monthly commitment incurs a 20% premium.

PACKAGE COMPARISON	Sales Instant Start 365 £495	Sales Rapid Start 365 £1,995	Sales Quick Start 365 £4,495
Setup of a new Office 365 tenant if required	✓	✓	✓
Creation of a new Dynamics 365 environment	✓	✓	✓
Analysis session to fully review your requirements	✗	✗	✓
Assignment of licences to users	✓	✓	✓
Creation of Business Units and Security Roles	✗	✗	✓
Assignment of Security Roles to users	✓	✓	✓ PLUS Business Units
Configuration of Server-side Synchronisation (integration with Office 365)	✓	✓	✓
Basic customisation of Contact, Account, Lead and Opportunity tables	✗	✓ (maximum of 30 columns)	✓ (maximum of 100 columns)
Creation of up to 2 custom tables (maximum of 100 columns across all tables)	✗	✗	✓
Customisation/creation of Views	✗	✓ (maximum of 10 views)	✓ (maximum of 30 views)
Customisation of Business Process Flows	✗	Customisation of **existing** 'Lead to Opportunity' and 'Opportunity' sales processes	Customisation of a **new** 'Lead to Opportunity' sales process (maximum of 8 stages) Customisation of a **new** opportunity sales process to match above process (maximum of 8 stages)
Data imports using provided templates	✗	Import of Accounts and Contacts using provided templates	Import of Accounts, Contacts, Leads and Opportunities using provided templates
Creation of a new Sales Dashboard	✗	✗	✓
Training and Testing session	✗	✗	✓
Guidance for users on how to access Dynamics 365	✓	✓	✗
Introduction to Microsoft's guides and learning platform	✓	✓	✓

Microsoft Dynamics 365 Customer Service

Earn customers for life with our customer service packages. Develop stronger relationships with your clients, quickly resolve issues, meet Service Level Agreements, and provide more effective support. Stay on top of everything with a case management system which does not rely on the knowledge of just a few staff.

Empower teams with tools for increased productivity	**Deliver better customer service based on insights**	**Schedule the right resource at the right time**	**Personalised self-service solutions**
Increase customer retention and CSAT scores by enabling agents to get answers faster. Resolve issues using case routing, queues and knowledge articles. Analyse and act on customer feedback.	Track support usage, analyse support insights, and measure customer sentiment. Track success against KPIs and ensure that service commitments are being met against SLAs.	Schedule resources for service activities more efficiently, taking into account the availability of employees, skills, facilities, and equipment. Improve service quality by preventing over-scheduling.	Self-service portals help customers to help themselves, with issue logging, case history, knowledge articles and forums.

Customer Service Instant Start 365

Do you already have an in-house technical team or someone with previous knowledge and skills of the Microsoft Dynamics 365 platform? With our Instant Start 365 package, we will get Microsoft Dynamics 365 Customer Service set up using best practice, and your team can take it from there. This package is best for businesses with in-house resources that can customise Dynamics 365 Customer Service, or organisations that want to use the application out of the box.

Customer Service Rapid Start 365

This package is best for those who need to get up and running with Microsoft Dynamics 365 Customer Service as soon as possible. It includes a little bespoke customisation to suit your individual business, ensuring you can get started quickly with the basics. This package is also a good choice for anyone who needs to test-drive the features before adopting the solution more broadly. Our Rapid Start 365 package offers an affordable way to get started quickly with the basics, and is best for companies that do not yet have the budget to go the extra mile.

Customer Service Quick Start 365

Do you have a growing team that could benefit from a little extra help and training on how to get the most out of Microsoft Dynamics 365 Customer Service? This package includes a more thorough analysis session so we can determine your requirements and your way of working to create the best fit. Our Quick Start 365 package is also ideal for larger businesses wanting to implement a proof of concept before growing their platform further. This option is also the only package that includes a training and testing session to ensure your team is getting the most out of Microsoft Dynamics 365 Customer Service and includes more bespoke customisation.

Licence Options

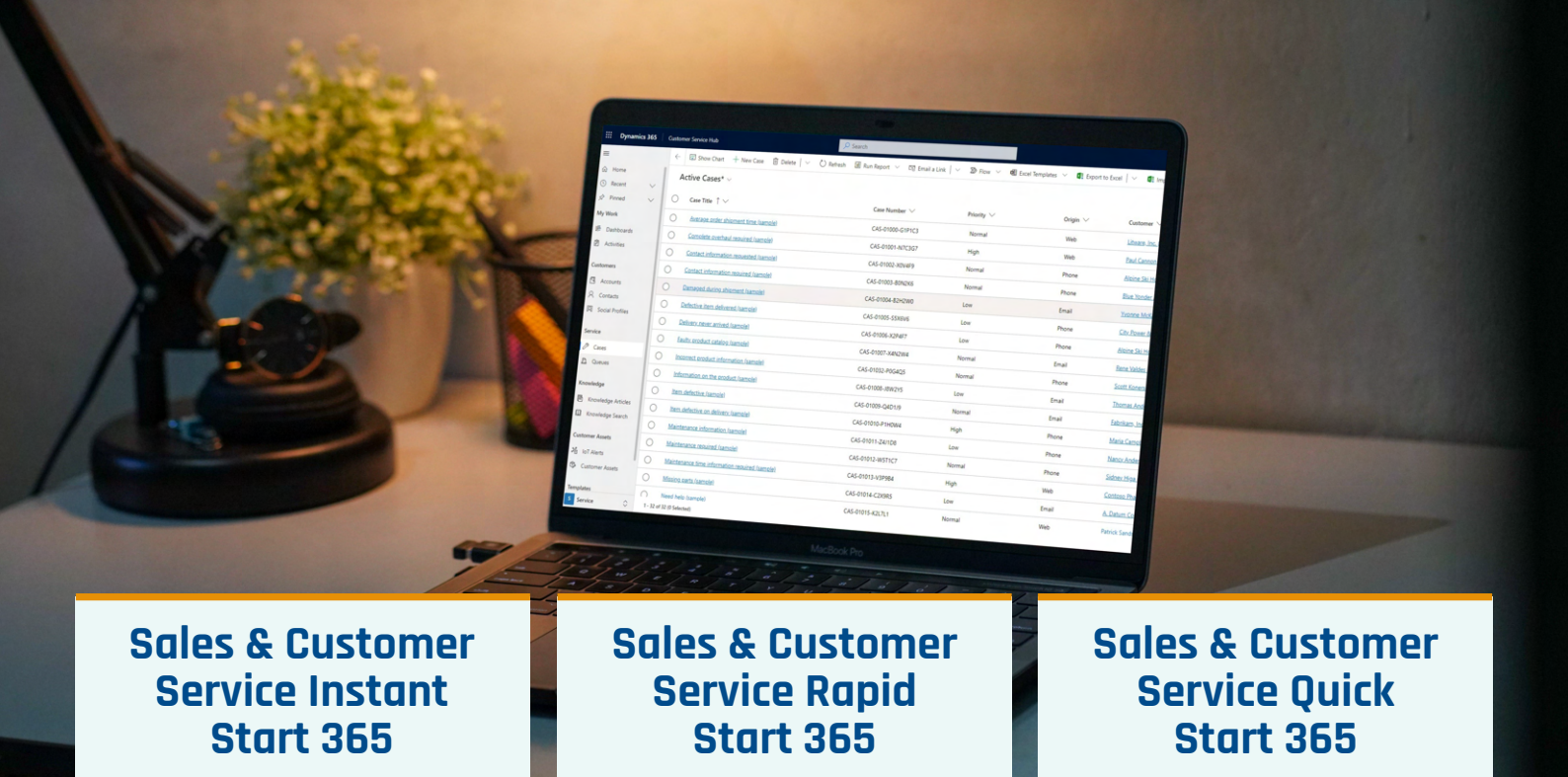Option 1: Dynamics 365 Customer Service Professional – £37.70 per user, per month

Option 2: Dynamics 365 Customer Service Enterprise – £71.60 per user, per month

Team Member (for light usage and read-only access) – £6 per user, per month

Prices shown are based on annual commitment. Monthly commitment incurs a 20% premium.

PACKAGE COMPARISON	Customer Service Instant Start 365 £495	Customer Service Rapid Start 365 £1,995	Customer Service Quick Start 365 £4,495
Setup of a new Office 365 tenant if required	✔	✔	✔
Creation of a new Dynamics 365 environment	✔	✔	✔
Analysis session to fully review your requirements	✖	✖	✔
Assignment of licences to users	✔	✔	✔
Creation of Business Units and Security Roles	✖	✖	✔
Assignment of Security Roles to users	✔	✔	✔ PLUS Business Units
Configuration of Server-side Synchronisation (integration with Office 365)	✔	✔	✔
Basic customisation of Contact, Account and Case tables	✖	✔ (maximum of 30 columns)	✔ (maximum of 100 columns)
Creation of up to 2 custom tables (maximum of 100 columns across all tables)	✖	✖	✔
Customisation/creation of views	✖	✔ (maximum of 10 views)	✔ (maximum of 30 views)
Customisation of **existing** 'Case' Business Process Flow	✖	✔	✔
Data Imports using provided templates	✖	Import of Accounts and Contacts using provided templates	Import of Accounts, Contacts and Cases using provided templates
Creation of a new Case Dashboard	✖	✖	✔
Training and Testing session	✖	✖	✔
Guidance for users on how to access Dynamics 365	✔	✔	✖
Introduction to Microsoft's guides and learning platform	✔	✔	✔

Sales & Customer Service Instant Start 365	Sales & Customer Service Rapid Start 365	Sales & Customer Service Quick Start 365
£495	**£2,995**	**£5,995**

Combined Dynamics 365 Sales and Customer Service packages

If you want to manage your whole customer journey from that first phone call through to managing orders and delivering quality after-sales service, our combinations of Microsoft Dynamics 365 Sales and Customer Service packages are the perfect fit.

Dynamics 365 Sales will enable your sales team to build strong relationships with customers, take action based on automated insights, and close sales faster. Salespeople can keep track of their accounts and contacts, nurture their sales from lead to order and even create sales collateral in a few simple steps. You can help to engage with customers by creating marketing lists and campaigns, as well as keeping track of service cases associated with specific accounts.

Dynamics 365 Customer Service's comprehensive case management features ensure your business always provides the highest levels of service, with SLAs ensuring

prompt care and an in-depth knowledge base to aid with the distribution of guidance.

By combining a Dynamics 365 Sales package with a Customer Service package, your team will gain access to the complete picture. Your team will be able to personalise their service with tailored experiences supported by 360° customer views.

As an added bonus, you can also combine customer data with survey insights from Dynamics 365 Customer Voice, which is included with Dynamics 365 Customer Service.

Licence Options

Option 1: Dynamics 365 Sales & Customer Service Professional – £64.10 per user, per month

Option 2: Dynamics 365 Sales & Customer Service Enterprise – £86.70 per user, per month

Team Member (for light usage and read-only access) – £6 per user, per month

Prices shown are based on annual commitment. Monthly commitment incurs a 20% premium.

If you require more information about our services, call us on 01782 916920.

Need something different? Discover endless possibilities with custom-built Microsoft Power Apps

Although the Power Platform allows for the deployment of Microsoft's own comprehensive business apps such as Dynamics 365 Sales and Customer Service, simpler custom apps can also be created - removing not only unnecessary functionality but also reducing the overall cost of a business application significantly.

On the other hand, you might have a bespoke requirement where your organisation's needs are completely different to the capabilities of Microsoft Dynamics 365 Sales and Customer Service. A custom Power App can be created to suit your exact needs.

Examples of custom Power App uses include: Membership organisations, site surveys, IT services, charity work, legal practices, training services, event management, property maintenance, health services, other B2C or B2B service providers.

Instant Start Power Apps	Rapid Start Power Apps	Quick Start Power Apps
£495	£1,995	£4,495

Instant Start Power Apps	Do you already have an in-house technical team or someone with previous knowledge and skills of Microsoft Power Apps? With our Instant Start package, we will implement a Power Apps environment using best practice, and your team can take it from there. This package is best for businesses with in-house resources that are familiar working with Power Apps.
Rapid Start Power Apps	This package is best for those who need to get up and running with a bespoke Power Apps solution as soon as possible. It includes customisation to suit your individual business, ensuring everything is set up correctly. This package is ideal for anyone who needs to test-drive the features before adopting the solution more broadly. Rapid Start offers an affordable way to get everything up and running smoothly and is best for companies which do not yet have the budget to go the extra mile.
Quick Start Power Apps	Do you have a growing team who could benefit from a bespoke business application, with extra help and training on how to use it effectively? This package includes a more thorough analysis session, so we can determine your requirements and your way of working to create the best Power Apps solution. It is also ideal for larger businesses wanting to implement a proof of concept before growing their platform further. This option is also the only package that includes a training and testing session to ensure your team is getting the most out of the solution and includes more bespoke customisation.

Licence Options

Option 1: Power Apps per app plan – £3.80 per user, per app, per month

Option 2: Power Apps per user plan – £15.10 per user, per month

*Prices shown are based on annual commitment. Monthly commitment incurs a 20% premium.*

Even the smallest businesses can have complex business processes that are unique to them. Others may still be using legacy software to manage core aspects of their operation. Although Dynamics 365 can comfortably bridge most gaps, there are times when you might need a little extra assistance getting Dynamics 365 to work exactly in the way your business needs; this is where a bespoke project comes in.

For more information, call us on 01782 916920.

Need a larger, bespoke solution?

If your organisation's requirements go above and beyond what is provided by our Dynamics 365 and Power Apps Quick Start packages, or you need more of a helping hand, we also offer full project implementations.
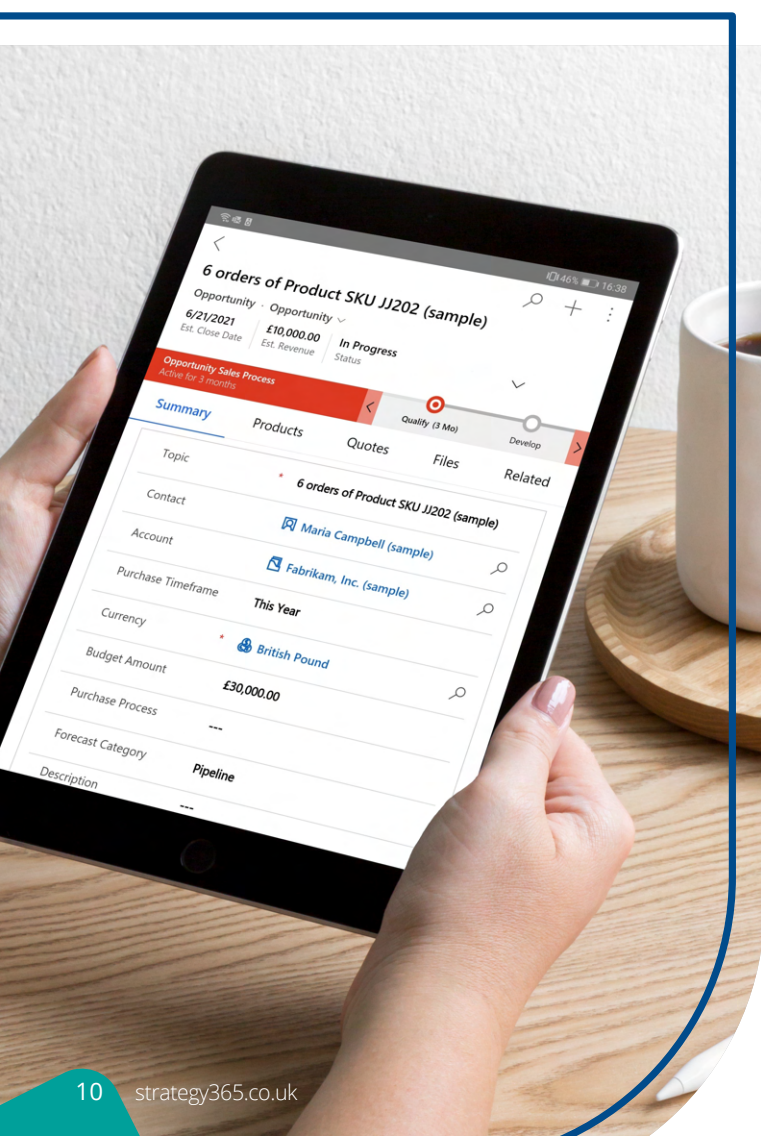
Expert Dynamics 365 and Power Apps Implementations

Once you have decided that Microsoft Dynamics 365 or Microsoft Power Apps is right for your business, it is vital that your project is implemented correctly. A poor deployment can result in project delays, spiralling costs and frustrated users.

By partnering with Strategy 365, you can ensure that best practice methods are followed and that you are guided every step of the way through to a successful roll-out. We will discuss your project goals and gather detailed business requirements before beginning any system implementation. We can also ensure that any required integration with your existing business software platforms are accommodated with our Data Integration Services.

As the project progresses, you can be sure of high levels of communication to provide peace of mind that everything is running smoothly and your stakeholders' high expectations will be met. Project team members can also collaborate on project tasks via the Strategy 365 Customer Support Portal.

Still unsure which option is right for you? Call us on 01782 916920.

Why choose Strategy 365?

At Strategy 365, our aim is to help you and your business' growth by utilising the vast range of Microsoft cloud products. From a full Dynamics 365 implementation to a simple custom Power App, our team of experts can bring clarity to your project implementations or simply just save you money on your Microsoft licence costs.

Our pricing is upfront and transparent, with no surprising hidden costs mid-project. We aim to be fair and competitive, ensuring you are able to deliver the best solutions for your staff and customers without having to compromise due to price.

Helping you to help your customers

As a self-funded business, we are not driven by investor interests to be purely driven by profits. Instead, our clients are our investors; therefore we focus all our efforts on helping our clients achieve more with their own customers. Your success is our success. Our core values ensure that we will always put your needs first.

Microsoft Partner

As a specialist Microsoft business applications partner, our staff have the highest levels of technical expertise. All our staff are Microsoft certified across various areas of Dynamics 365 and the Power Platform, so you can be assured of the highest levels of service.

"Nothing is too much trouble for the Strategy 365 support desk and they are all great ambassadors for the company. They always explain things clearly and will hop onto a screen share to explain further. They all seem like nice, polite, reasonable people."

Head of Sales,
Steel Service Centre Limited.

Implementation Services

By partnering with Strategy 365, you can ensure that best practice methods are followed and that you are guided every step of the way through to a successful roll-out.

Support Services

Our support services packages allow you to utilise Strategy 365's expertise in the way that best suits your business needs. We have you covered.

Microsoft Licensing

Could you be saving money? Are users on the right licence for the role they perform? Strategy 365 can help you choose the right plan for your users and your budget.

"A lot of other tech companies you speak to are quite dull and not very enthusiastic. They don't light up when they talk about their work. This is where Strategy 365 differs. They are very passionate about what they do, and their account management is great for customer retention.

Managing Director, Envisage Associates Limited.

Our Mission Statement

Removing the confusion of business applications and digital transformation by offering a tailored approach to the full project lifecycle, from analysis, through to deployment, training and ongoing support. Delivering intelligent Microsoft Business Applications, in line with customers' broader strategy and needs.

Ready to implement a CRM system?

quickstart@strategy365.co.uk

+44(0)1782 916920

Scan QR code

Microsoft Partner

Microsoft

Strategy 365

Enabling business growth

www.strategy365.co.uk