

Microsoft Dynamics 365 for CRM

The Armanino
Advantage

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Armanino can help you increase sales productivity, reduce costs and increase profitability with a customer relationship management (CRM) solution based on Microsoft Dynamics 365. As one of the largest Microsoft Dynamics partners in the nation, Armanino offers business and technology consulting as well as software implementation, training and support to ensure your success with Microsoft Dynamics 365.



Become a Dynamic Business

Empower your organization to deliver the kind of customer experiences that grow revenue, loyalty and your business. Microsoft Dynamics 365 for CRM offers unsurpassed flexibility, productivity and ease of use. As part of the Microsoft solution stack, Dynamics 365 for CRM integrates with other Microsoft solutions such as Dynamics 365 for Finance and Operations, Dynamics GP, Outlook, Office 365, Lync, Skype, Yammer and SharePoint—unifying your front- and back-office systems for streamlined business processes.

Understand the Importance of Expertise

Many companies today have CRM installations that don't meet their needs—often because the software isn't integrated or doesn't support the unique requirements of their industry and business. To avoid costly mistakes and get the greatest return on your CRM investment, work with an experienced partner that offers more than a simple installation of your CRM system. You need a partner that can provide strategic business guidance before, during and after your implementation, for CRM and beyond.

Rely on Armanino

A Gold Certified Microsoft Dynamics 365 partner, Armanino provides:

- **Management advisory services** for business process reengineering, IT governance and compliance, and best practice recommendations for enhanced productivity across sales, marketing and customer service
- **Sales, training and support** service for all Dynamics 365 CRM modules.
- **Implementation and customization** for Dynamics 365 for Sales, Customer Service, Field Service, Project Service Automation, Marketing, and Customer Insights.



Microsoft Partner

Gold Enterprise Resource Planning

Gold Customer Relationship Management

A Full Solution for Optimal Productivity, Collaboration and Control

Armanino services and expertise go far beyond the base Microsoft Dynamics 365 for CRM product to incorporate tools organizations need to improve productivity, enable collaboration, and gain insight and control across business processes, including:

- Sales force automation
- Marketing and marketing automation
- Customer service and call center
- Field service
- Social media sentiment analytics
- SharePoint portals and collaboration
- Office 365 productivity
- Lync, Skype and telephony integration
- ERP integration
- Enterprise social collaboration with Yammer
- Mobility and mobile application support
- Project Service Automation (PSA)



Get a Solution Designed for Your Industry and Your Business

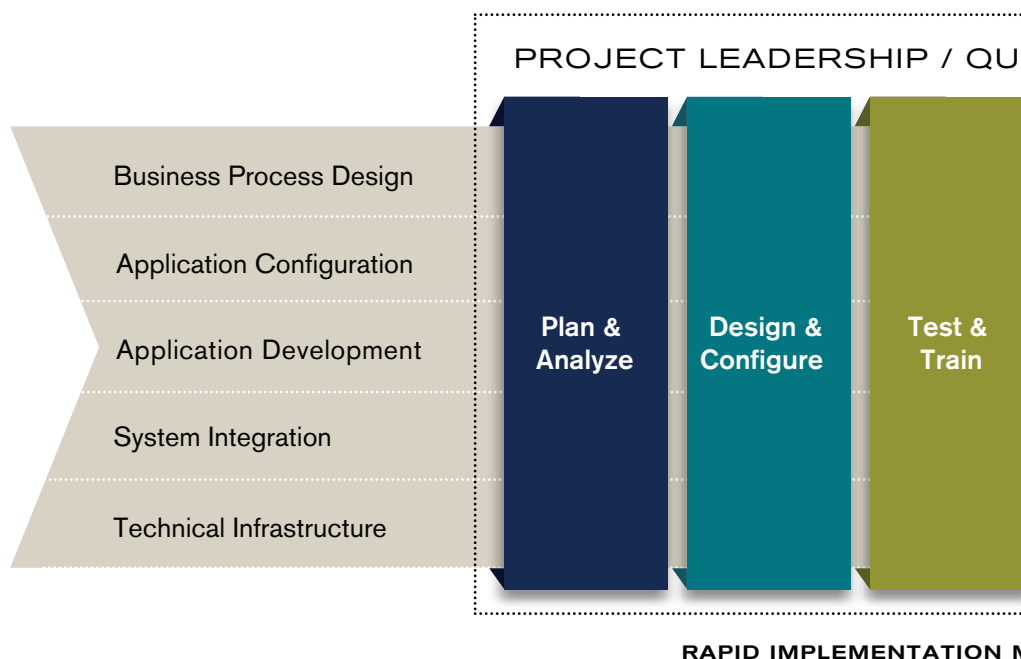
Don't settle for a cookie-cutter CRM system that doesn't support the unique requirements of your industry or your processes. Instead, choose a solution built for the way you do business.

Microsoft Dynamics 365 CRM solutions from Armanino are customized for the needs of your industry and your company. We combine industry best practice expertise with our in-house developed, industry-specific application functionality to help you better manage and automate complex business processes such as forecast management, design win and warranty management.

Industry-Specific CRM Functionality From Armanino	Key Features & Benefits
Warranty Management & Product Repair	<ul style="list-style-type: none">Streamline management of return material authorization and field service processesAutomate product and resource trackingImprove scheduling
Return Materials Authorization (RMA)	<ul style="list-style-type: none">Improve RMA trackingAutomate RMA processes to streamline workflowEnhance reporting and notifications
Forecast Management	<ul style="list-style-type: none">Accurately forecast with detailed, global informationAutomatically track orders over time against trade agreement commitmentsImprove coordination among sales, finance, manufacturing and partners
Design Win	<ul style="list-style-type: none">Gain greater visibility and control of the design win processTrack all sales, engineering, and customer service activities that comprise winning a designAutomatically synchronize information with your enterprise planning resource (ERP) system
Territory Management	<ul style="list-style-type: none">Visualize total addressable market and market penetrationSegment data by sales territories to optimize territory alignment and account allocationDrill down by sales representative, location, size of company and industry

Think Strategically

Delivering the business capabilities you need involves more than software. Based on our deep process knowledge and proven best practices, Armanino can help you achieve success and optimize your operations by addressing all aspects of the solution, including people, processes and technology. Our advisory and consulting services can help you deploy your business solutions in the most strategic, thoughtful way to maximize your return on investment.



Implementation: Quick and Painless

Armanino's proprietary Rapid Implementation Methodology is a proven, comprehensive approach to successfully fulfill the business goals and regulatory requirements of your CRM deployment. Our methodology combines:

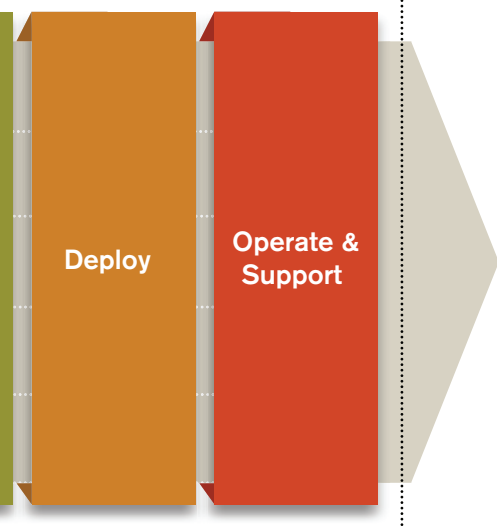
- Training (including both web-based and classroom-style courses)
- Rapid implementation templates
- Industry-specific configuration templates

Our implementation best practice tools include end-to-end models that define industry-specific CRM business processes. Developed through years of industry experience, these models are used to determine system flow and user roles and responsibilities. From there, our team works with you to identify processes unique to your business and create a system that provides the best value for your organization.

Integration: End-to-End Visibility

Systems integration is often essential to achieve the end-to-end business process improvement and the return on investment you expect from your CRM deployment. Integrating your new Dynamics 365 CRM system with other systems in your company enhances visibility, keeps data synchronized and automates processes across the enterprise to reduce your operating costs and ensure management visibility:

QUALITY MANAGEMENT



METHODOLOGY

- **CRM to ERP:** When Armanino integrates your Dynamics 365 CRM system with your ERP system, you gain an end-to-end view across production, sales, customer service and marketing.
- **CRM to other proprietary solutions:** Armanino can integrate your Dynamics 365 solution with other third-party solutions you may be using in your organization, such as DocuSign for electronic signatures and InsideView for market intelligence.

“ With the knowledge and experience the team brought to the project and their focus from day one on getting our people up to speed quickly, Armanino helped make the transition to Microsoft Dynamics CRM completely seamless.”

— Nate Hoke
Director of Customer Service
Crimson Trace

“ Dynamics CRM has become an essential tool that we rely on for our day-to-day and overall continued success.”

— Barry Brunetto
VP of Information Services
Blount

Training: Give Your Staff the Skills to Succeed

From creating new contacts to sharing files with team members, make sure your team receives the information and skills they need to maximize their comfort and productivity with Microsoft Dynamics 365.

Armanino's experienced team of Microsoft Master Certified Trainers has trained thousands of students nationwide. Every Armanino class offers certified courseware, hands-on exercises and interaction with other Microsoft Dynamics users. Our instructors' teaching skills, application expertise and real-world experience benefit both new and seasoned Dynamics software users.

Support: We're There When You Need Us

Once your organization is up and running on Dynamics 365, we transition you from the implementation team to the Armanino Dynamics support team. Our trained experts provide 24/7 support in tandem with Microsoft's support services—ensuring that cases are resolved quickly and your business continues to operate efficiently. Additionally, Armanino offers Managed Service plans, which provide you with a preset number of consulting hours that can be used to support existing applications or pull from a pool of highly dedicated experts across multiple Armanino practice areas to strategize, support and execute your initiatives, all for one predictable monthly rate.

It takes a team effort to ensure your company is getting the greatest return on its CRM investment. Armanino is a strong, responsive and experienced partner for all your CRM needs. We serve businesses with simple or complex requirements, single or multiple entities, and domestic and international operations. Join hundreds of Armanino clients who value us as their trusted Dynamics partner.

To learn more about how we can help your company optimize its sales, marketing and customer service for improved business results, contact:

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Armanino Brings Deep CRM Industry-Specific Experience:

- High-tech manufacturing
- Discrete manufacturing
- Professional services
- Life sciences (medical device manufacturers, pharmaceuticals)





The Armanino Advantage

- Recognized in Accounting Today's annual list of Top VARS in the U.S.
- More than 120 Microsoft Dynamics dedicated consultants
- The largest Microsoft Dynamics 365 for ERP and CRM, Dynamics GP and Power BI practice for high-tech and life sciences manufacturers in the U.S.
- Solution-centric, value-driven
- Deep industry expertise and economy of scale to consistently deliver great service at competitive rates
- Established full-service provider to serve you now and in the future
- International operations expertise
- Commitment to 100% client success



LOCATIONS

San Ramon, CA

925 790 2600

San Jose, CA

408 200 6400

San Francisco, CA

415 568 3280

Dallas, TX

972 661 1843

Downtown Los Angeles, CA

213 334 7300

West Los Angeles, CA

310 478 4148

Woodland Hills, CA

818 587 9300

El Segundo, CA

310 822 8552

Chicago, IL

630 868 5000

Strategic Insights, Practical Action

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the U.S. and globally.

You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks and exploring the practical implications of both your short- and long-term decisions.

When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If your challenge is financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes and technology.

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