

**TRUSTMARQUE**

Part of Capita plc

# CRM READINESS ASSESSMENT



## Put your customers at the centre of your business

Building and maintaining effective customer relationships is essential to today's business climate. By 2020, customer experience is expected to overtake price and product as the key differentiator, according to business consultancy Walker.

Microsoft Dynamics CRM is a fully integrated Customer Relationship Management system, designed to help you put your customers at the centre of your business by improving interaction and communication between teams within your organisation.

Microsoft Dynamics benefits all sizes of business to; done, and connecting in real time with co-workers and customers. It also gives you a first-hand look at the fast and fluid experience of Windows 10 and the exciting features of the Office suites across a variety of devices, including tablets, PCs and smartphones.

Microsoft Dynamics benefits all sizes of business to:

- **Improve your customer management processes**  
With an end-to-end view of customer activity
- **Tailor your customer engagement**  
With a 360 degree view of your customer interactions
- **Integrate teams across the business**  
By aligning sales, marketing, and customer service efforts in one place
- **Access valuable customer information**  
Providing real time information that gives you a greater insight to your customers
- **Increase business productivity**  
As essential information can be shared openly between teams

"With the CRM, it takes two or three clicks for an appointment to be integrated on the CRM system, and colleagues can see when the appointment is. We have gone from having to input things two maybe three times to only once. Now it can be one glance at a computer screen and we know that we need to go in a certain direction, or provide a service that we are not currently providing."

Jacob Roberts, Business Information Manager at the Growth Hub



## Your organisation is unique. So why not your CRM?

Through partnering with our customers we create an actionable plan for your organisation and personal CRM journey. We offer a CRM Readiness Assessment service which includes:



### DISCOVER

Where you are on your journey with CRM? What are you trying to achieve? What are the business outcomes that you are trying to drive? What are your pain points? What are your reporting goals?



### EXPLORATION

These are specific workshops to assess what areas of the CRM journey you would most benefit from, and approach to the achieving these. E.g. service management, mobile accessibility, contact management, lead tracking, social engagement and self-service.



### PLANNING

Creation of tailored recommendations to your needs.

## Why Trustmarque & Tiski

Trustmarque is already working with many organisations at different stages of their CRM project. From simple advice and guidance to providing planning services, we are helping organisations realise their move to the Cloud, as well as offering expert guidance on key factors such as security, legislation and data compliance.

Tiski are not only proud of the products that they offer, they believe that they have developed a level of knowledge and a range of supporting services that are unsurpassed in their industry. Not only will they ensure that their customers' CRM, ERP, Microsoft Office, or marketing solution are the correct fit, they will also provide continual support, to ensure the new system, and the processes are embed into your organisations DNA.

They are committed to getting your team well trained and confident in the use of your new solution. They understand that it's the adoption and usage of your new system that makes it a true success. This is where Tiski is different to other vendors, they have the industry experience, expertise and knowledge to deliver the results you need first time – every time.

