



**RSM! McGladrey**

RSM McGladrey  
Technology Business  
Solutions

Microsoft Dynamics™ CRM  
Solution Overview

Customer data is often not fully integrated among areas such as marketing, accounting and manufacturing. This makes it difficult to track a total customer experience, since customers interact with companies in most or all of these areas. Customer relationship management (CRM) software can create a centralized location for storing customer data — a key component in helping a business grow sales and improve service to clients.

At RSM McGladrey, we've helped many companies successfully implement CRM software packages. We provide implementation and integration support for Microsoft Dynamics™ solutions including Microsoft Dynamics™ CRM. Microsoft CRM is a complete customer relationship management solution that provides all of the tools and capabilities needed to create and easily maintain a clear picture of customers — from first contact through purchase and post-sales.

### **Implementation services for Microsoft CRM**

We combine new technologies, proven methodologies and broad-based business knowledge to successfully implement Microsoft CRM. Our implementation model consists of five phases:

- Project planning and design
- System design and pilot
- System set-up and training
- Go live
- Acceptance testing

We work closely with your key staff members to evaluate and address all of your business needs. We also help you determine the best way to integrate your CRM software with all of your other accounting and operational systems. Once you're up and running, you'll have support whenever you need it. Our technology consultants are available to help with post-implementation questions and any other assistance you may need. In short, we're committed to being a valued business partner beyond the implementation process.

Because our organization is structured to align with industries, our consultants not only understand technology, but also have experience in several key industries including manufacturing, distribution, health care and financial services. And as part of RSM McGladrey's full-service strategy, we offer a complete range of other business consulting services. We provide risk management, financial management, operations and strategy consulting in addition to our technology services.

### **Support you can count on**

For almost 20 years, RSM McGladrey has helped nearly 1,500 clients implement Microsoft-based business management solutions. We are consistently recognized as a top business partner for Microsoft Dynamics solutions. RSM McGladrey is also one of a select group of business partners included in Microsoft's Inner Circle and President's Club. As a Microsoft Gold Certified Partner, we're able to provide superior response and

## **Redefine customer relationships with Microsoft CRM**

Business moves at light speed, requiring that every company continuously reexamine direction, strategies, suppliers, partners — literally every variable and relationship that might lead to complacency.

Microsoft CRM delivers a fast, flexible and affordable solution that drives measurable improvements in business processes, enables closer relationships with customers and helps your company achieve new levels of profitability.

With Microsoft CRM, you can create a centralized repository of customer data that sits neatly alongside Microsoft Office and Microsoft Office Outlook® — the applications your employees probably use every day.

## **Works the way you do**

Microsoft CRM is a fast and easy way to add customer relationship management capabilities to any organization that uses Microsoft Office or Outlook. Because it was designed to partner with Outlook, Microsoft CRM delivers lower training costs, broader user adoption, less application-switching, higher productivity and a rapid return on investment.

Microsoft CRM can give your employees direct access to customer information through Microsoft Outlook, enabling access to information when they need it, in the office or on the road.

## **Works the way your business does**

Microsoft CRM not only slips right into your employees' lives without disruption, it also adapts easily to your existing business workflow and processes. You can quickly modify application forms, data fields and relationships, and add new activities and objects without writing a single line of code.

This makes it easy to tailor Microsoft CRM to suit your needs and fit your business like a glove. You'll also find a number of elegant workflow innovations that speed use, including next-step suggestions and automatic task assignment.

## **Works the way technology should**

Microsoft CRM works the way your IT staff wants it to because it's based on proven, industry-standard Microsoft technology that's easy to learn and work with.

You'll enjoy a rapid, low-cost deployment, low support costs and easy scalability as your business grows. And if you prefer, RSM McGladrey also offers a hosted Microsoft CRM solution through our application service provider capabilities.

To learn more about RSM McGladrey's technology  
business solutions services contact:

800.274.3978

[www.rsmmcgladrey.com](http://www.rsmmcgladrey.com)

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