



Customer  
Conference

# Using CRM in Business Central

# Today's Presenter



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# Agenda

- ✓ Discuss the “Why” you are using CRM
- ✓ Understand how to align it with your Sales Process
- ✓ Demo some of the Relationship Management in Business Central that will help you close more deals

**Approx. 2/3's of CRM  
Implementations are  
considered Failures**





# The “Why” behind CRM



# Define your Sales Process First

- ✓ Hope is not a strategy!
- ✓ You can have multiple sales processes/cycles
- ✓ Make it so your Sales Reps want to enter data, not avoid it
- ✓ Use it for Sales Coaching, not Compliance

# Demo in Business Central RM





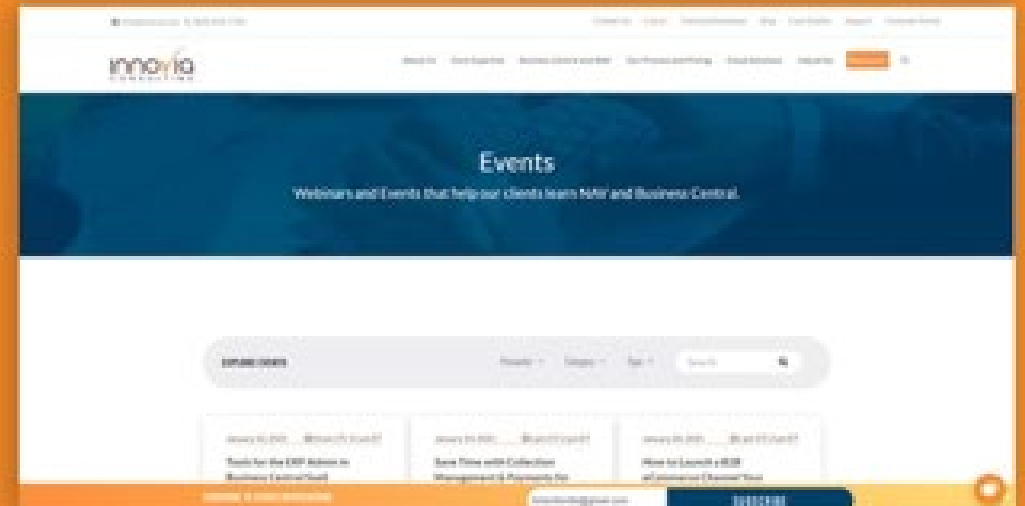
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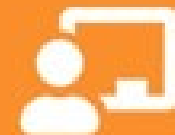
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