



Leading sales transformation

KPMG CRM Services for Microsoft Dynamics

In today's market, technology innovation is shaping the way organizations like yours operate. Change is constant and disruption is rapidly becoming the norm. When it comes to technology, getting it right can mean a sustainable advantage over your competition—and at KPMG LLP (KPMG), we have the tools, experience, and advice to help you achieve it.

The technology solutions and advice to help you get to the next level

At KPMG, we deliver tangible results with Microsoft technology. Going further than the average systems integrator, our talented team combines deep business experience with extensive technical capabilities to develop technology solutions that enhance your organization.

KPMG approach and service delivery

KPMG has developed a strong Microsoft customer relationship management (CRM) delivery team embedded within our Customer Advisory and Sales Effectiveness practice. Utilizing our broad CRM Enablement approach, we support our clients' objective of realizing CRM optimization. Our approach to CRM implementations includes a focus on strategy, process, organization, operating models and technology, while leveraging our proprietary sales effectiveness and CRM capabilities to expedite the execution of all phases of work, as well as the realization of business value.

KPMG's offering goes beyond IT to:

- Understand the complexities of transformation and its potential effect on your business
- Deliver smooth implementation and technical support
- Provide strategic consultancy and initial evaluation
- Help you gain insight into your customers' digital experience
- Convert data into real business results.

Our team of talented professionals has experience working with organizations across a broad range of industries including:

- Financial services
- Healthcare and life sciences
- Consumer products
- Public sector.
- Retail

KPMG's suite of Microsoft Dynamics CRM Services

The KPMG–Microsoft CRM Services offering is a strategy, business, and process-driven approach to successfully deploying technology solutions that enable sales transformation, user adoption, and increased sales effectiveness. Leveraging our deep industry, functional marketing, sales, and service experience in addition to our Microsoft-certified Dynamics practitioners, KPMG delivers:

- CRM strategy, architecture, current-state assessment, and maturity model assessment
- CRM road map planning and execution
- Full system development life cycle through implementation and postproduction support
- CRM user adoption expeditor
- Sales operations center of excellence development
- CRM insights and analytics.

KPMG CRM services for Microsoft Dynamics enable clients to:

Improve business results

- Increase sales productivity via enhanced lead generation, guided sales process, focus on selling versus administrative time, higher close rates, etc.
- Identify cross-sell/up-sell opportunities to increase share of customer

Improve performance tracking

- View performance across geographies, business units, customers, teams, individuals, and opportunities
- Single view of prospects/customers

Improve efficiency of the sales model

- Provide consistent/repeatable sales process
- Increase yield on a per-sales rep basis

Improve cross-account teamwork/coordination

Improve customer service and governance.

Contact

Michael Herman
Advisory Principal
T: 917-769-5367
E: michaelherman@kpmg.com

Deb Cox
Alliance Director
T: +1-214-727-3975
E: deborahcox@kpmg.com

Bob Hess
Alliance Director
T: +1-908-705-3772
E: roberthess@kpmg.com

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Our CRM approach provides potential benefits to common challenges being faced across a company's organization:

Organizational function	Challenges	Potential benefits
Business	<ul style="list-style-type: none"> – Rapidly changing customer landscape – New competition – Increased market complexities – Globalization – No single view of customers/prospects – Limited adoption of sales tool in the field 	<ul style="list-style-type: none"> – Improved sales results – Improved performance tracking – Improved efficiency of the sales mode – Improved teamwork/coordination of activities at an account/opportunity – Improved customer service
Finance	<ul style="list-style-type: none"> – Transition and integration costs – IT funding model – Value realization 	<ul style="list-style-type: none"> – Increased ROI on CRM – Cloud solution offers shift from CAPEX to OPEX
Risk	<ul style="list-style-type: none"> – Information protection – Identity and access management – Records management and retention practices 	<ul style="list-style-type: none"> – Risk mitigation – Stronger security policies and practice – Protection of sensitive data – Increased compliance
IT	<ul style="list-style-type: none"> – IT operating model, resources and skills – Legacy infrastructure and operations efficiency – Integration with existing environments – Hybrid cloud model 	<ul style="list-style-type: none"> – Reduce redundancy, improve efficiency – Single view of customer – Enable business innovation – Deliver the right information to the right people at the right time

Local experience – global mindset

KPMG is the U.S. member firm of KPMG International Cooperative (KPMG International). KPMG International operates in 155 countries with over 174,000 people working in member firms around the world. So whether your organization is implementing new technology solutions in one location or several, we can be there. Our specialized teams have:

- **The experience and advice your business needs**
- **The resources and capability to work across borders and across your organization**
- **Dedicated delivery centers focused on Microsoft implementation, configuration, and ongoing support.**

A team that delivers

We can address your transformative technology needs, from adopting cloud and mobile technology, configurations, and complex integrations to providing 24/7 support services after your go-live. Our teams:

- **Understand your unique challenges to help identify the right technology solution for your organization**
- **Deliver leading technology on time and at a reasonable cost.**

The ability to think bigger

When it comes to business change, adopting the right technology solution is just part of the equation. We bring a fresh perspective to the challenges you face because we understand how organizations operate. And because we have extensive experience with business transformations, we can:

- **Offer tested solutions and leading-practice advice**
- **Recognize where, when, and how technology can help unlock tangible value—while keeping the overall picture in mind.**

Take the next step

At KPMG, we are not here just to implement IT systems. Our team of experienced professionals is dedicated to helping you make the most out of your technology investment—so you can achieve genuine business value.

To learn more, please visit us at kpmg.com/microsoft.

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INNER CIRCLE
for Microsoft Dynamics

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