

Dynamics Implementation

March 6, 2024

Introduction



We have partnered with BDO to create a CRM system that will considerably improve our operations. We are paving the way for a future Niagara Region wide CRM.

After an 8-week Minimum Viable Product (MVP) phase, we will be getting the following capabilities:

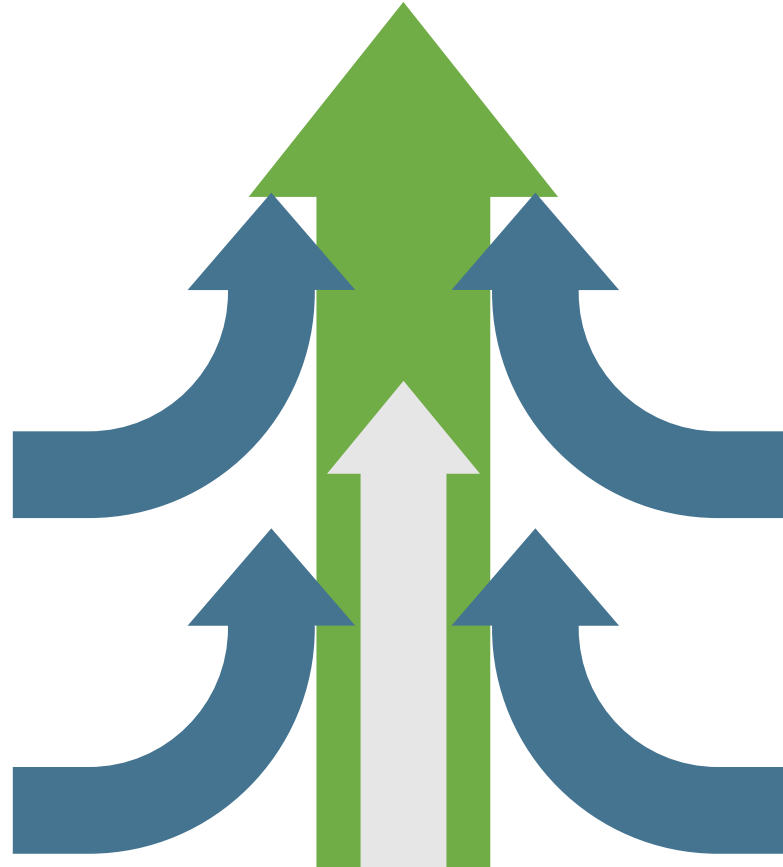
Key Capabilities

IMPROVED INTAKE

Enhance lead management through improved intake, documentation, and traceability

ENHANCED PIPELINE MANAGEMENT

Implement advanced tools and features to automate lead management workflows



DATA DRIVEN INSIGHTS

Provide valuable analytics and reporting tools, offering insights and enabling data-driven decision-making across the organization

STREAMLINED SUCCESSION PLANNING

Enable seamless traceability of key contacts and accounts to optimize and streamline the succession planning process

Timeline & Approach

Discover

Conduct sessions with the team to identify pain points and objectives, and design the system

Build

Conduct comprehensive system development and testing to ensure alignment with objectives and priorities

Improve

Implement the new system into daily operations, initiating regular use, and document a plan for future enhancements

AUG

SEP

OCT

Next Steps

