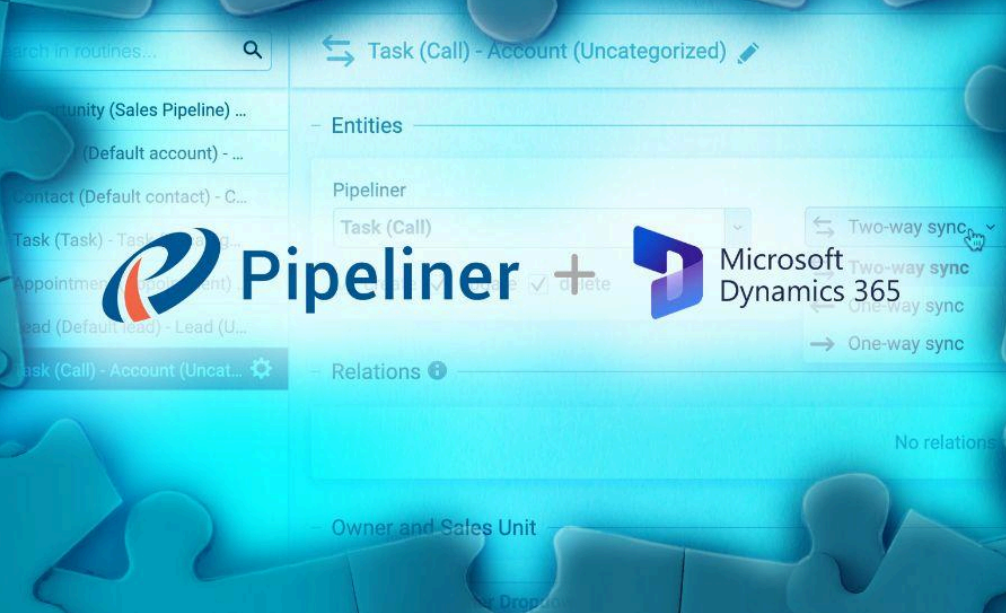




WHITE PAPER

The Pipeliner CRM MS Dynamics 365 Booster

↳ Increase Effectiveness!



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You have invested a lot of time and money into your **Microsoft Dynamics 365** platform but still struggle with adoption, usage, costly administration, long hours for creating reports and ROI in general. Switching platforms, however, may not be an option due to the amount of custom work, integration and investment, as well as the need to avoid the business interruption a migration would entail.

Pipelinier CRM is the first solution that addresses these issues without any risk on your side

- ✓ Coexist with your existing Microsoft Dynamics 365 installation (*literally sit on top- without double licenses cost*).
- ✓ Save you money by reducing the number of Microsoft Dynamics 365 licenses needed and replacing them with Pipelinier licenses that your sales team will embrace.
- ✓ Leverage all the work done in Microsoft Dynamics 365 — no need to change architecture, fields, processes, reports etc.
- ✓ Your team will have everything they need, with an interface they enjoy, as well as easy administration when necessary.

Introducing the Microsoft Dynamics 365 Booster from Pipelinier CRM!

Deploying Pipelinier CRM on top of Microsoft Dynamics 365 using the Booster:

- ✓ **Saves you money immediately** – replace some of your expensive Microsoft Dynamics 365 licenses with far more cost-effective Pipeliner CRM licenses (*see below for more details on savings*).
- ✓ **The Booster can be deployed in hours** and uses your existing Microsoft Dynamics 365 structure so technical requirements and demands on IT staff are minimal.
- ✓ **Business interruption is almost non-existent** as the Pipeliner system can be learned in a few hours given the visual and intuitive nature of the systems.
- ✓ **Above all, working with Pipeliner will drive greater visibility into revenue**, increase forecast accuracy and allow for better sales performance management and coaching.
- ✓ **With monthly feature/functionality updates/enhancements** as well as the market-leading AI for Sales component Pipeliner Voyager AI, your team will always be using the latest technologies.
- ✓ **No need for expensive certified admins** – Pipeliner's backend is so intuitive it can be administered by those working in the business
- ✓ **Your team will actually like using the system!**
- ✓ **You will start to realize greater Return on Investment (ROI)** from your Microsoft Dynamics 365 investment thanks to the increased usage and productivity the Pipeliner Microsoft Dynamics 365 Booster brings.

The Pipeliner CRM

Microsoft Dynamics 365 Booster

At Pipeliner CRM we are proud to introduce a completely new approach with the first and only real Microsoft Dynamics 365 Booster. This is more than a traditional integration, this is a unique booster built exclusively for Microsoft Dynamics 365.

We chose to sit on top of Microsoft Dynamics 365 because we recognized that many companies are dissatisfied with the design and the ever-increasing costs of the platform.

Microsoft Dynamics 365 is seen as cumbersome, complicated, not user-friendly, as well as very costly, making it both inefficient and ineffective for sales. This not

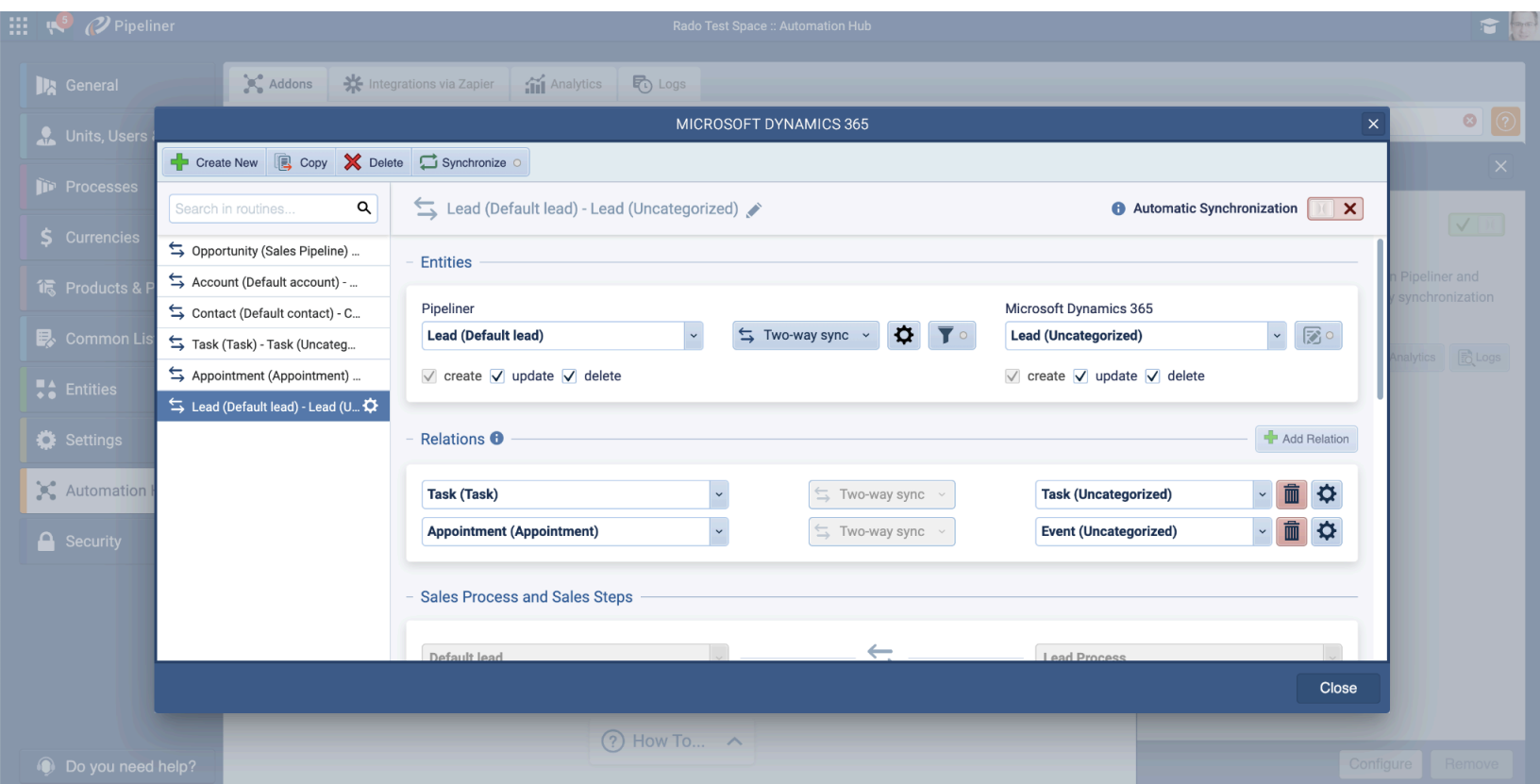
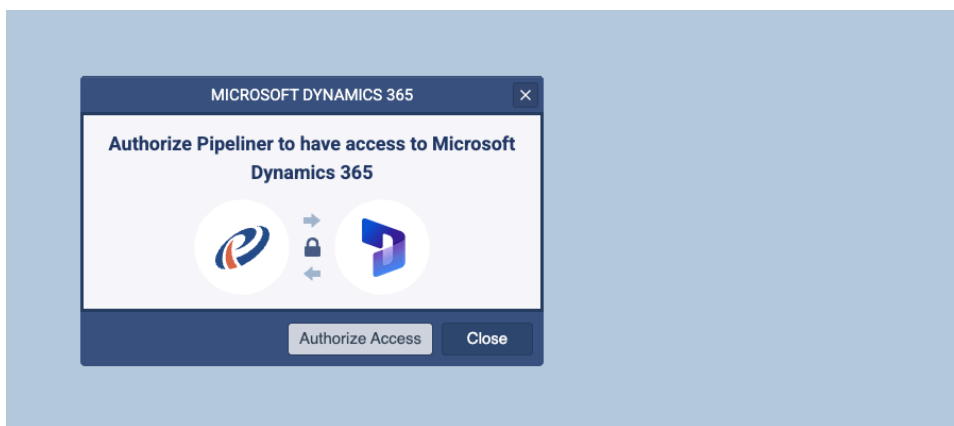
The screenshot displays the Pipeliner CRM Automation Hub interface. The top navigation bar includes the Pipeliner logo, a search bar, and user profile icons. The left sidebar lists navigation options: General, Units, User & Roles, Pipelines, Currencies, Products & Prices, Common Lists, Fields & Forms, Settings, Automation Hub (highlighted), and Security. The main content area, titled 'Main Space :: Automation Hub', features a 'Search in apps...' bar and a 'My Apps' section. This section contains a grid of integration cards: Microsoft Dynamics 365 integration (MARKETING & EMAIL), PandaDoc (PRODUCTIVITY), Google Contacts (PRODUCTIVITY), Business Card Scan (PRODUCTIVITY), Google Calendar (PRODUCTIVITY), Google Gmail (PRODUCTIVITY), and two IMAP Email (PRODUCTIVITY) integrations. On the right, a 'Microsoft Dynamics 365 Integration' panel shows a 'Status: RUNNING' indicator with a green checkmark and a description: 'Automatically synchronize data between Pipeliner and Microsoft Dynamics 365. Enables one-way or two-way synchronization of records with custom fields.' At the bottom right, there are 'Configure' and 'Remove' buttons. A 'Do you need help?' link is located at the bottom left of the sidebar.

only affects sales reps but also creates major challenges for sales managers, and executives.

Our solution was to create a sales booster that seamlessly integrates with the Microsoft Dynamics 365 platform. **The booster's design means that the months of backend work typically associated with integrations are avoided.** You

don't even need to do anything on the front end and your data is immediately available. Setting up this booster can be done in hours (*or at most a few days*) minimizing any business interruption. Additionally, you can cut your licensing costs almost in half saving you a significant amount of money (*this will be expanded upon later in this document*).

Now let's get into the details and share with you the compelling reasons you should consider this booster. «



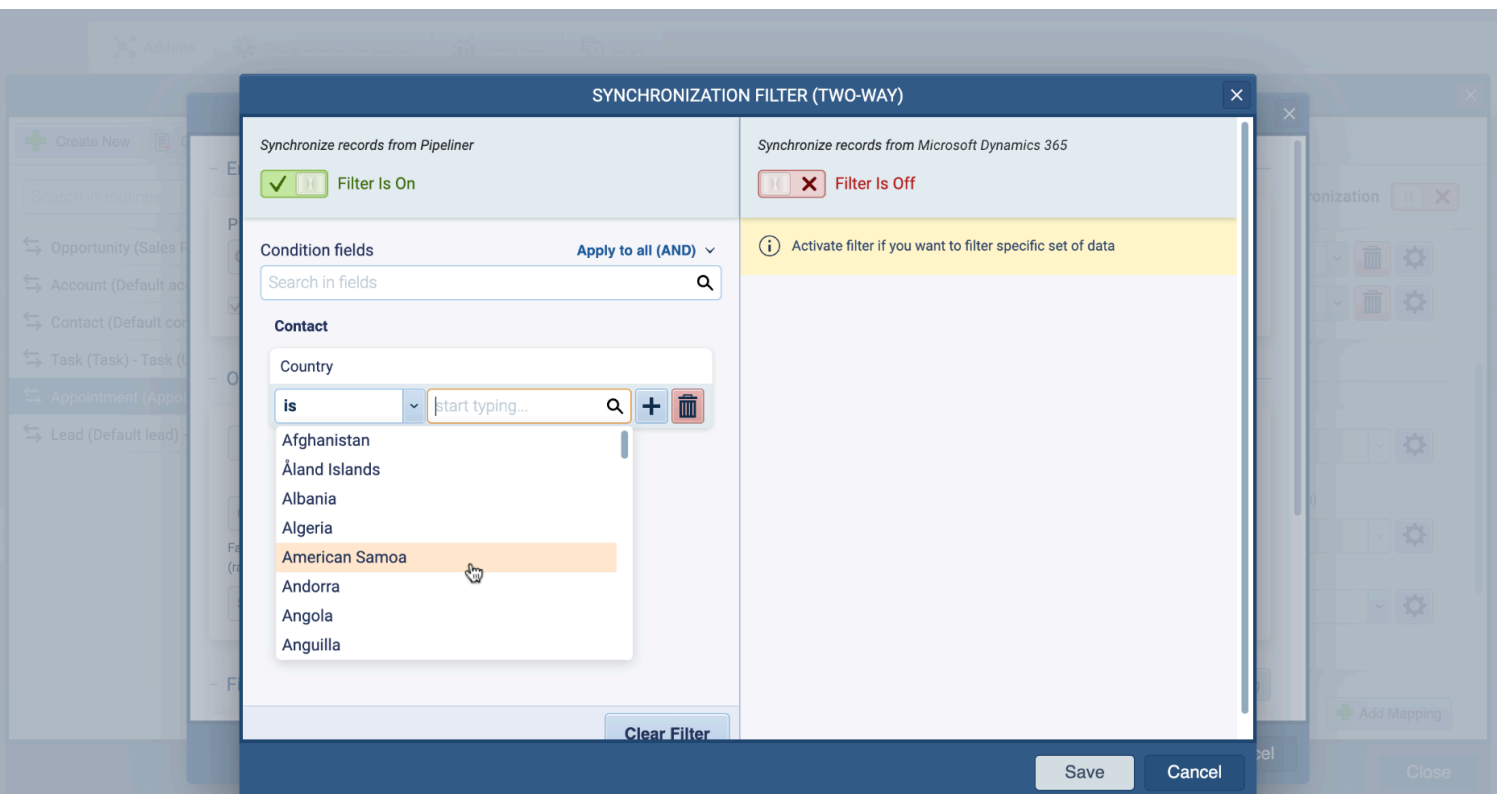
Increase Effectiveness!

All sales managers and salespeople understand the need to reduce the time spent on non-selling activities so they can focus on engaging and building relationships with existing and new customers.

Therefore, saving time is the number one issue. As we know, any repetitive task can be automated today. The question is not whether you should automate your tasks, but rather how easily they can be automated.

We also know that computers never go on vacation or get sick, making them the most reliable of resources. So why not take advantage of automation?

To maximize selling time, the CRM system must be easily understood, adopted, and managed by sales teams. This allows your sales team to move through the



platform quickly and get the information needed faster. Being able to operate with this kind of speed is a real competitive advantage. Pipeliner's backend functionality, for example, can be learned in a matter of hours compared to weeks or even months in the case of Microsoft Dynamics 365.

We have made it so that existing processes you may have defined in Microsoft Dynamics 365 can simply be copied and pasted into Pipeliner, it's that simple.

Plus there is nothing for you to program or learn, all you need to do is simply map the fields one by one to the different entities like leads, opportunities, accounts, contacts, notes, product line items, or custom entities. It is up to you whether you map the fields from Pipeliner to Microsoft Dynamics 365 or vice versa whichever is more efficient or productive for your business. We help you build on what you already have rather than create something new. If, for instance, you have 100-200 licenses for salespeople, again with no backend work and a simple process for mapping fields, you could be up and running in a matter of a **few days**. «

The screenshot shows the Pipeliner CRM interface. The top navigation bar includes the Pipeliner logo, a search bar, and notification icons. The left sidebar contains navigation options: Detail, Quotes, Activities, Feeds, Buying Center, Documents, and Notes. The main content area displays the 'Detail' view for an opportunity named '[GEN] Nemaha'. The 'General Information' section includes fields for Opportunity name, Opportunity value, Closing date, and Ranking. The 'Microsoft Dynamics 365 Integration Info' section is highlighted with a red box and contains fields for Dynamics 365 ID, Dynamics 365 Owner, and Dynamics 365 URL. The 'Accounts and Contacts' section shows 'No Items Available' for both Primary Account name and Primary Contact name. The right sidebar displays 'Opportunity is open' with a count of 428, 'Approval Processes', 'Take action on this Opportunity!', 'Tags', 'Sales Pipeline' with a progress bar, and 'Automatizer'.

Reduce Costs!

Reducing costs is important, not just in times of economic turmoil but in general. Companies are always looking for ways to reduce their cost structure and to ensure a return on any investments they make to become more efficient and profitable.

The screenshot displays the 'Jeannine Fortier' contact profile in the Pipeliner CRM. The interface is divided into a sidebar on the left with navigation links (Detail, Leads, Opportunities, Relation Graph, Activities, Feeds, Documents, Notes) and a main content area. The main area contains a top bar with action buttons (Create New Activity, VCF, Copy, View Changes, Unsubscribe, Copy Address from Account) and a 'Full View' toggle. Below this is the contact's profile card, showing a photo, name, gender (Female), and a list of accounts (Ziemann and Sons, Primary). The contact's information is organized into sections: Account (Ziemann and Sons), MailChimp Contact ID (56b94e111f), Primary phone (636-378-0829), Mobile (empty), First NPS Score (0), Latest NPS Score (0), Secondary Phone, Home phone, Primary E-mail (j.fortier@ziemannandsons.com), Secondary E-mail, Street Address (7 Lillian Plaza), City (Coronda), State / Province, ZIP Code (2240), and Country (Argentina). A red arrow points to a button in the Mobile field. On the right side, there is a sidebar with a 'This contact is active' status bar, Social Networks, Automatizer, Email Sequences, Microsoft Dynamics 365 integration options (Open Microsoft Dynamics 365, Open), and a Team section (John Goddard, Owner, Change, Manage).

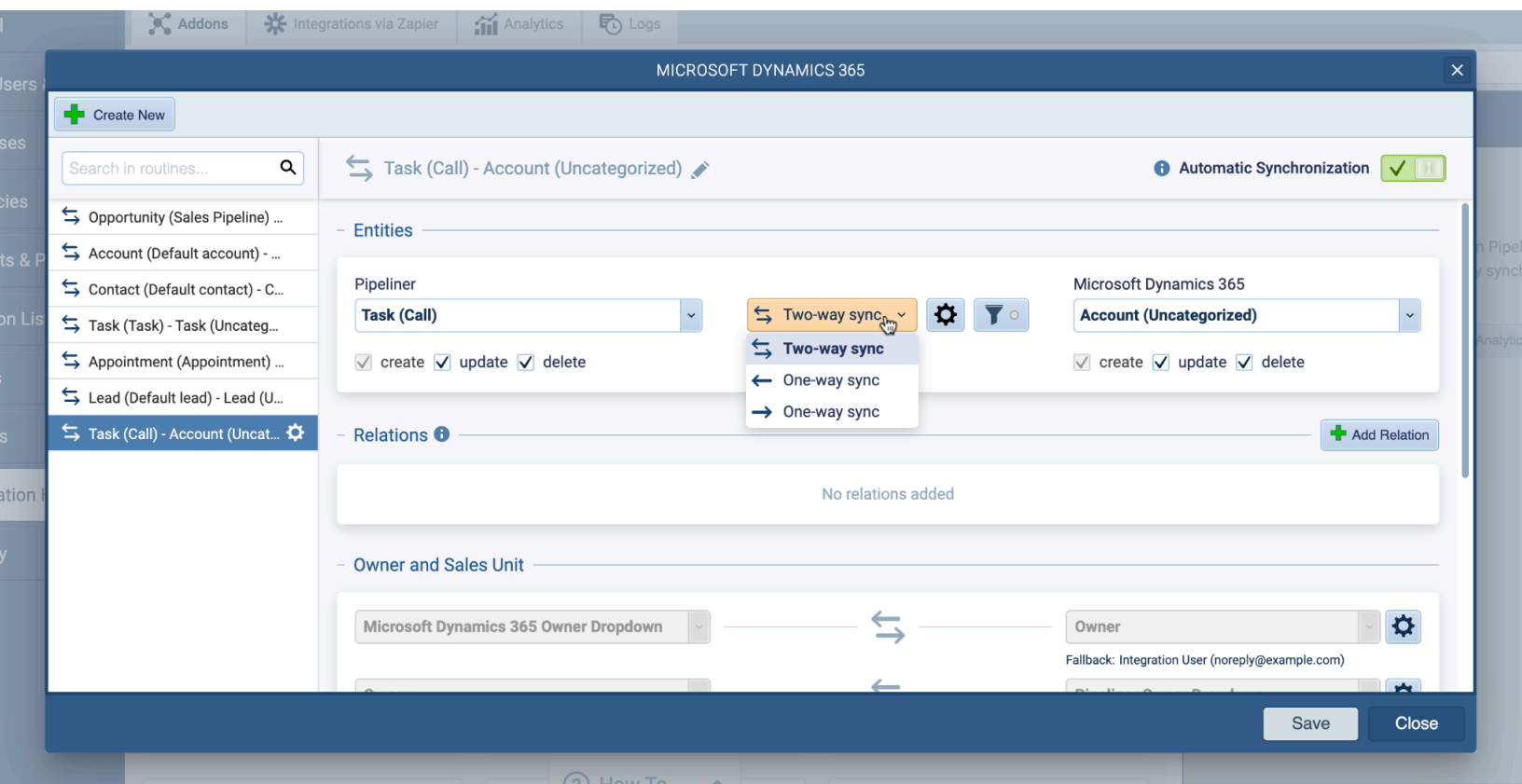
With the right tools, salespeople can become more effective and efficient, leading to increased productivity and success. This is why we created the Microsoft Dynamics 365 Booster – to help larger companies reduce their cost structure while increasing their return on investment.

Based on our extensive experience working with many salespeople and sales teams, we conservatively estimate that each individual can save at least one hour per day using Pipeliner CRM compared to Microsoft Dynamics 365.

That is 20 hrs per month saved for each individual or 7,000 hours for the 350-user example. If we use \$50 per hour as the rate for an enterprise salesperson, this would amount to \$350k per month or \$4.2m per year in savings.

For any CFO or C-Level executive, the potential cost savings and productivity gains from using Pipeliner are extremely compelling — and in our opinion, it just makes good business sense.

To summarize the value proposition of using Pipeliner CRM and the Microsoft Dynamics 365 booster — you get a better CRM that the salespeople will love to use with no implementation costs. **We are that confident we will let you test it for free and then you can see for yourself the cost savings and productivity gains you could realize. «**





Pipeline CRM

Exceptional Engagement

The Better CRM > Built for Sales, Used by Sales!

 **TRY IT FREE**

or

 **FIND OUT MORE**



The Pipeline Universe — Sales Enablement, Knowledge, Networking

Pipeline CRM
pipelinesales.com

Sales POP!
salespop.net

Go Ahead!
go-ahead.global