

# Come & See Us at Directions!



**Sharka Chobot**



**Dr. Christian Lehmann**



**Angie Hirata**



	Speakers	Time	Location
8 Steps to Double Your Customer Ads	Sharka Chobot	Sunday, April 16 3:30 to 4:15	Windsong 1-2
Secrets to Driving and Converting More Leads From Appsource	Angie Hirata	Monday, April 17 2:15 to 3:00	Magnolia ABC
Marketing Best Practices to Generate Pipeline	Angie Hirata	Monday April 17 6:00 to 6:45	Magnolia ABC
High Volume Acceleration Round Table Discussion	Sharka Chobot + Fredrik Heitala	Tuesday, April 18 11:15 to 12:00	Regency 5
8 Go-to-Market Steps to Launch a Proactive Migration Strategy That Accelerates Moving Your On-Prem Customers to Cloud	Sharka Chobot Dr. Christian Lehmann	Tuesday, April 18 5:00 to 5:45	Regency 6-7
Best Practices for Building a High Volume Dynamics Practice	Sharka Chobot + Andrew King	Wednesday April 19 9:15 to 10:00	La Coquina & Alcove
Getting Started on Leveraging Power Platform to Build Low Code Industry Specific Solutions and Drive More Customer Value	Dr. Christian Lehmann	Wednesday April 19 10:15 to 11:00	Magnolia ABC
Microsoft presents: Build a low code partner practice - Opportunities & Guidance	Sharka Chobot, Dr. Christian Lehman , Christian Baek, Fredrik Hietala	Wednesday April 19 11:15 to 12:00	Palm A-F

For Sessions Slides and Resources Visit:

<https://neuralimpact.ca/directions-orlando-2023>



# Neural Impact at Directions

## Orlando 2023 Session Resources



+



# Directions Attendee Limited Exclusive Offer

## High Volume Acceleration Program 50% off Registration

<https://forms.office.com/r/cK1HdPBKwg>

- Limited to **first 5 partners only***
- Must register April 16 -19*
- Applicable to April 2023 Cohort Only*



# 8 Capabilities Needed to Double your Customer Ads

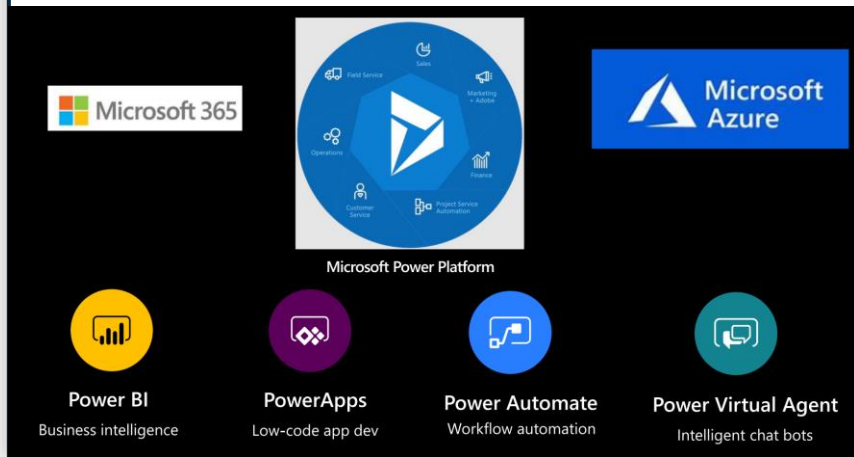
Sharka Chobot  
Chief Transformation Officer





# 15 Years working w Dynamics Partners

No onboarding.  
99% of our Clients =  
Microsoft Partners



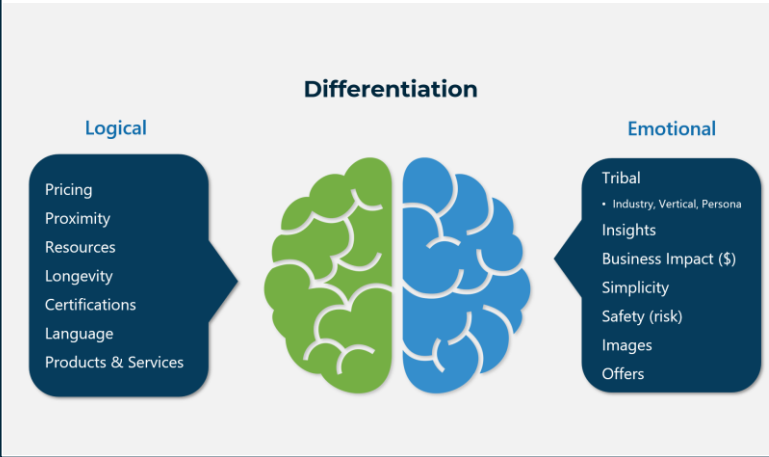
Microsoft 365

Microsoft Azure

Microsoft Power Platform

- Power BI: Business intelligence
- PowerApps: Low-code app dev
- Power Automate: Workflow automation
- Power Virtual Agent: Intelligent chat bots

## Experts in Neuroscience



Specialize in Customer  
Acquisition & SaaS  
Transformation Strategy  
Development

- Modern Digital Marketing
- Accelerated Remote Selling
- Cloud/SaaS Transformation



# High Volume Acceleration Program

Disruption



# SaaS = 2 Disrupters

Cloud Technology = Easier  
90% New Deals



Changing Buyer Behavior & Expectations  
Changing business model  
Harder!







718



911



Taycan



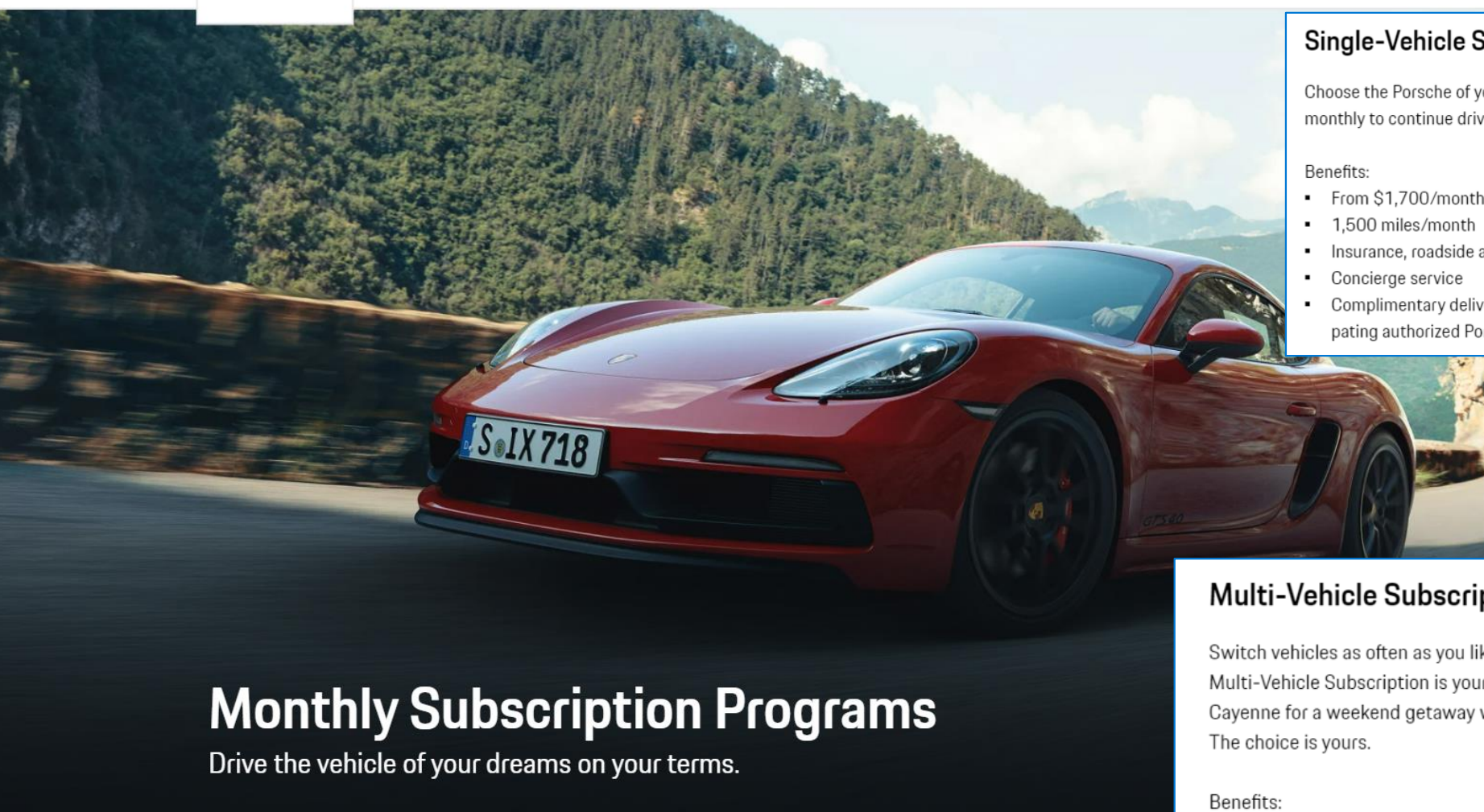
Panamera



Macan



Cayenne



# Monthly Subscription Programs

Drive the vehicle of your dreams on your terms.

## Single-Vehicle Subscription

Choose the Porsche of your dreams and drive it for an entire month. Extend your subscription monthly to continue driving it or change it up and try another model in the Porsche lineup.

Benefits:

- From \$1,700/month + tax<sup>1</sup> (pricing based on vehicle selection)
- 1,500 miles/month
- Insurance, roadside assistance, vehicle maintenance
- Concierge service
- Complimentary delivery and pick-up available for subscriptions within 20 miles of the participating authorized Porsche dealership

## Multi-Vehicle Subscription

Switch vehicles as often as you like throughout the month. When ultimate flexibility is desired, Multi-Vehicle Subscription is your program. Take the Taycan for a weekday commute. Book a Cayenne for a weekend getaway with the family. Switch and drive the 911 for special occasions. The choice is yours.

Benefits:

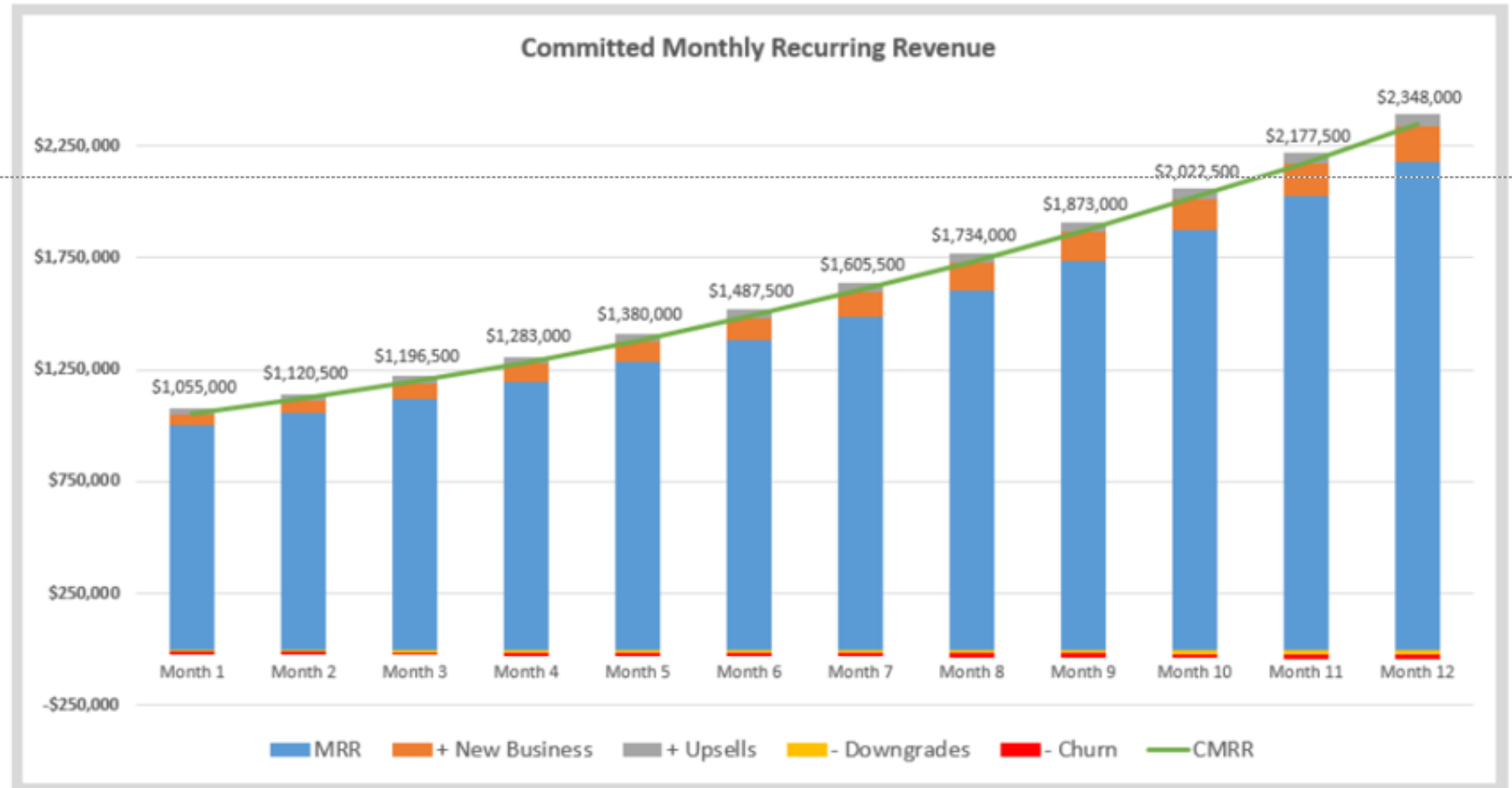
- \$3,600/month + tax<sup>1</sup>
- 2,000 miles/month
- Insurance, roadside assistance, and vehicle maintenance included
- Concierge service
- Complimentary delivery and pick-up available for subscriptions within 20 miles of the participating authorized Porsche dealership

# CMRR

## Committed Monthly Recurring Revenue (CMRR) Defined ★

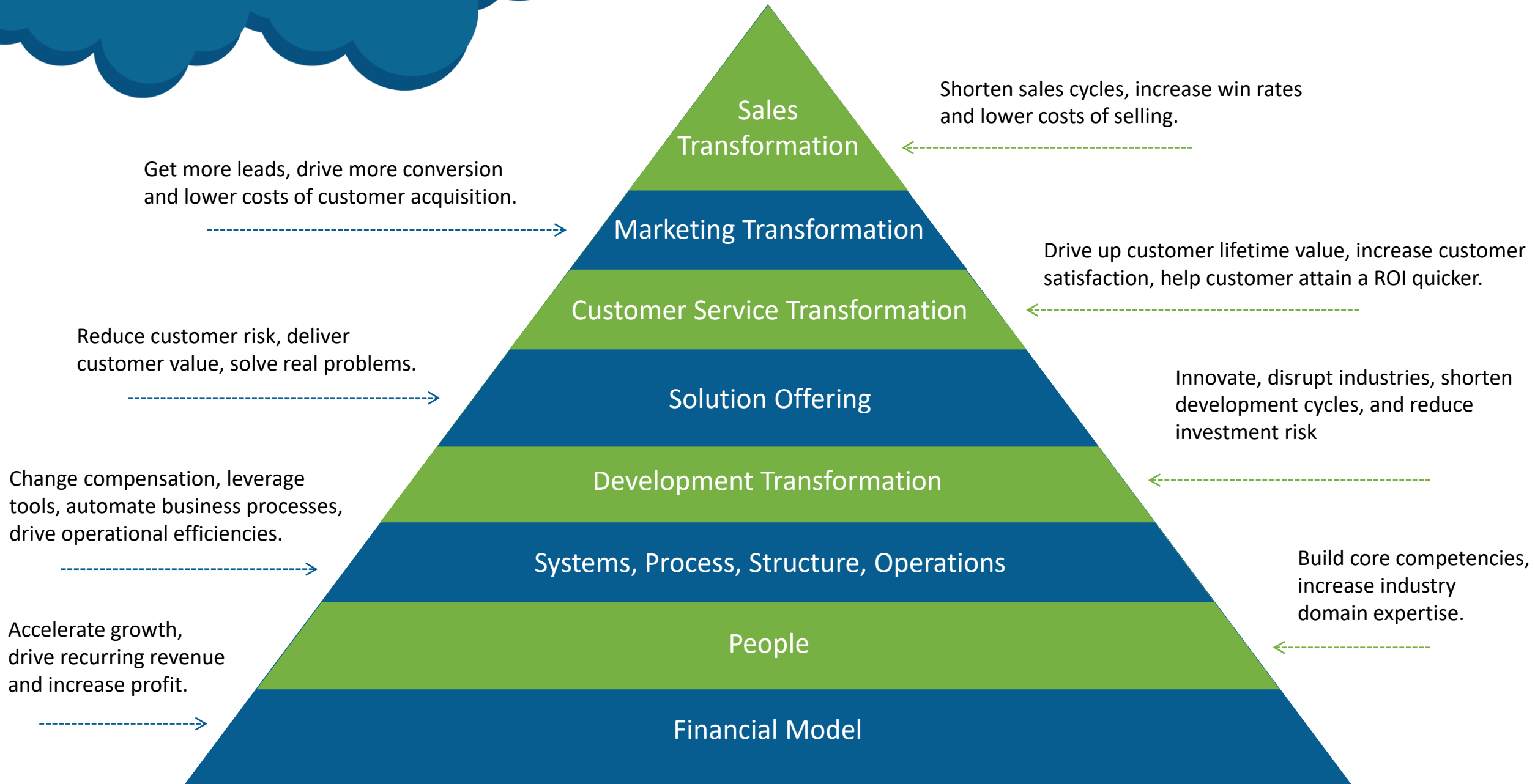
Posted on May 11, 2017 by Ben

Existing MRR  
+ New business bookings  
+ New upsell bookings  
- Downgrade bookings  
- Churn  
= Committed MRR

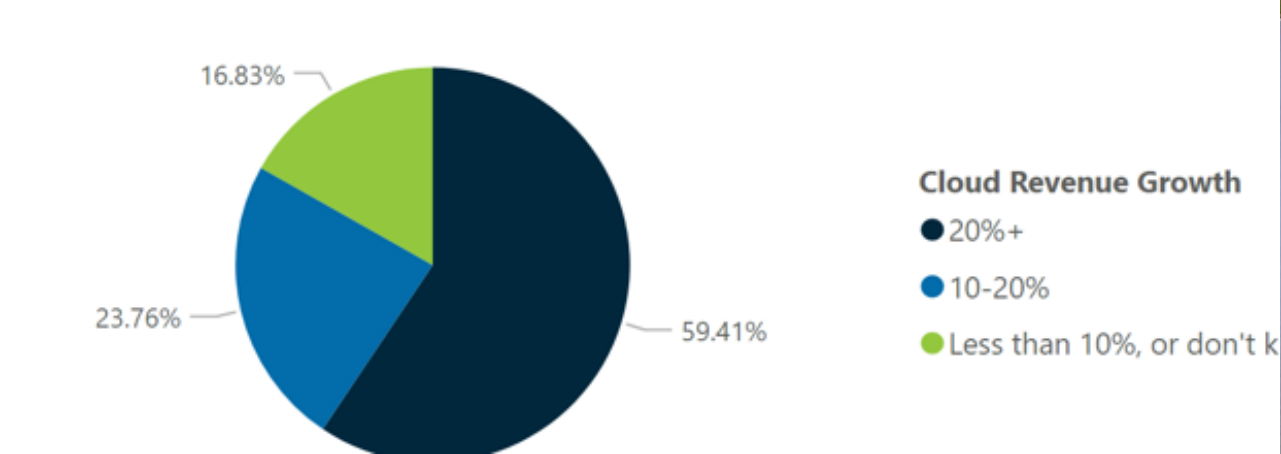


# SaaS Transformation Model

## Areas that need to change



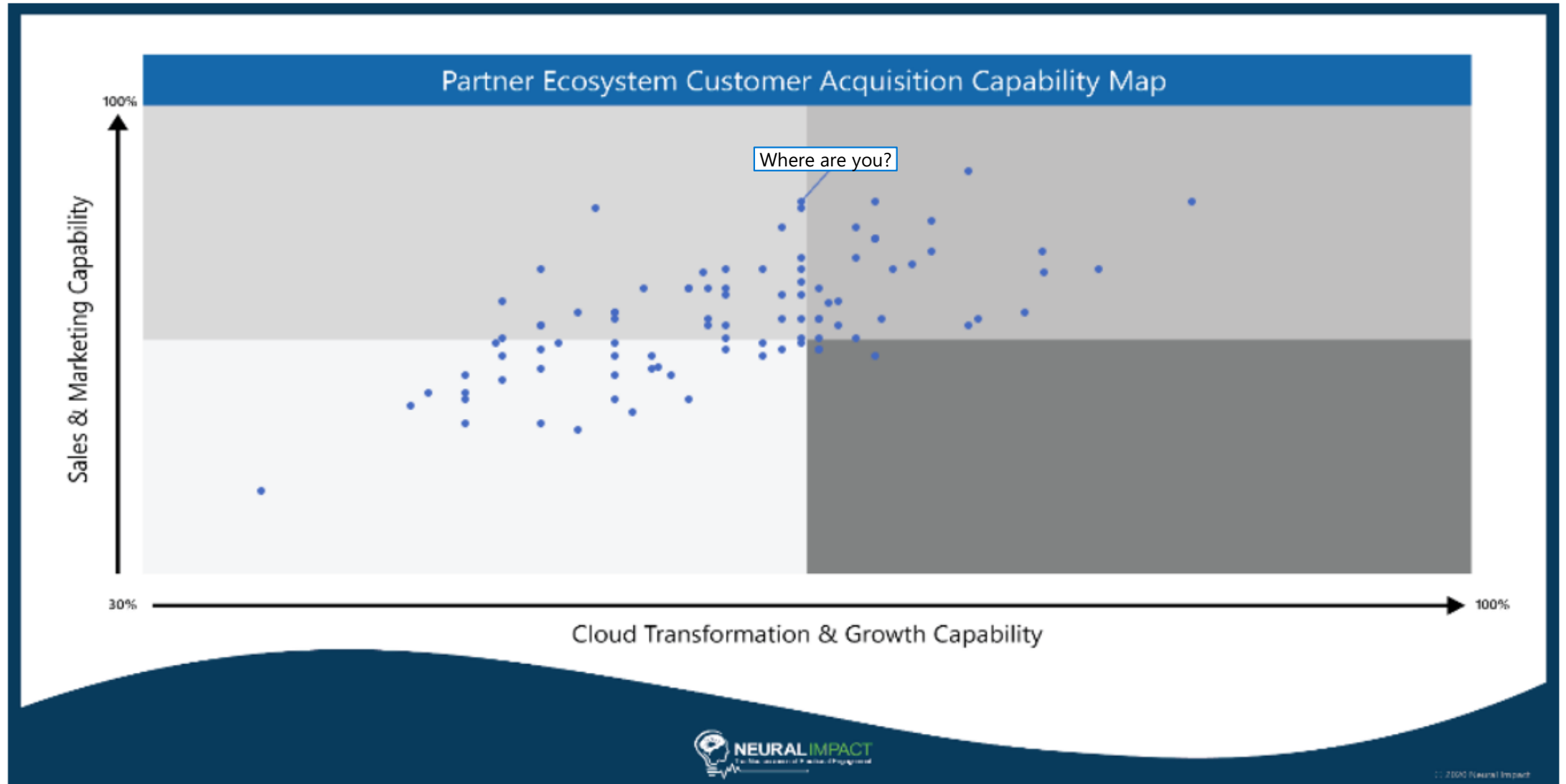






# See how you compare to other Microsoft partners around the world

The following **Partner Ecosystem Acquisition Capability Map** depicts how you are doing, overall, compared to the other partners in the ecosystem.

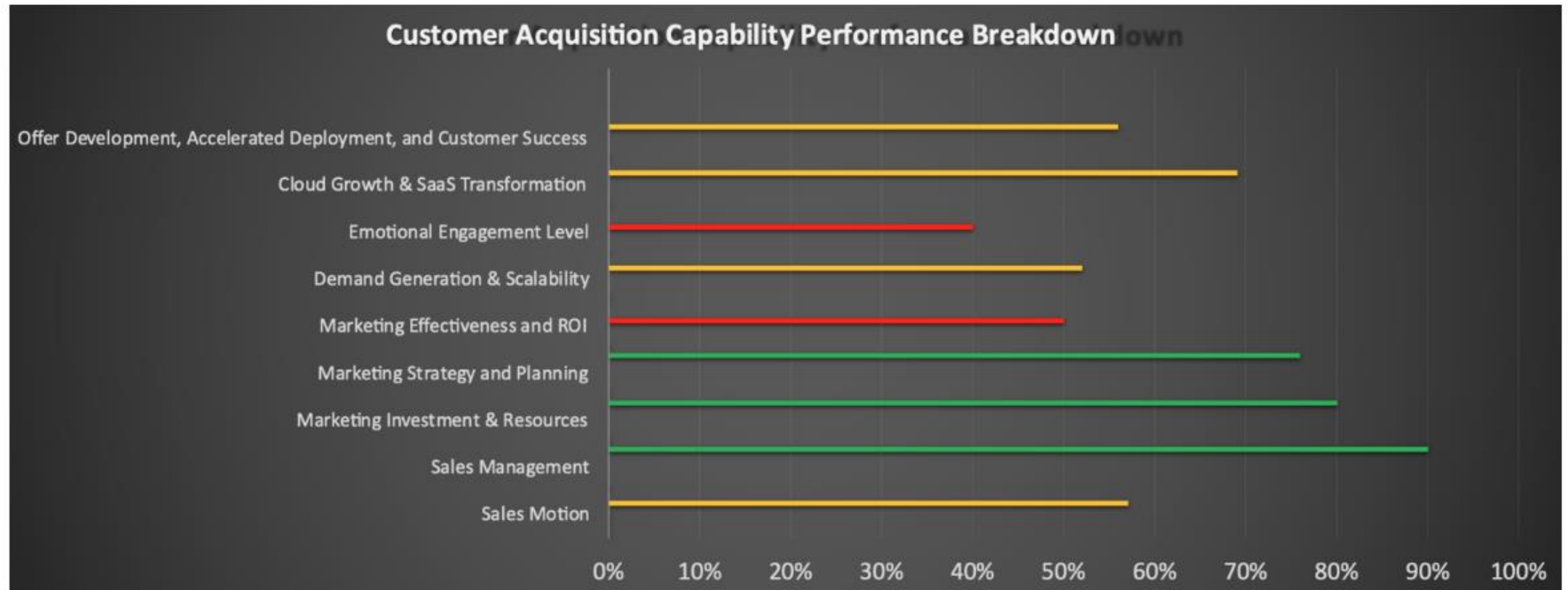


# Where are you in your SaaS transformation?

Conduct the self assessment and you will get a sense of where your gaps are

**FULL:** <https://neuralimpact.ca/customeracquisition:>

**Mini:** <https://forms.office.com/r/m3Mqwjq3RJ>





# New metrics that matter: Example - Avepoint

## Company Highlights

\$191.7M

Annual Recurring Revenue (ARR)

+30%

Q3 ARR Growth

+34%

Q3 SaaS Revenue  
Growth

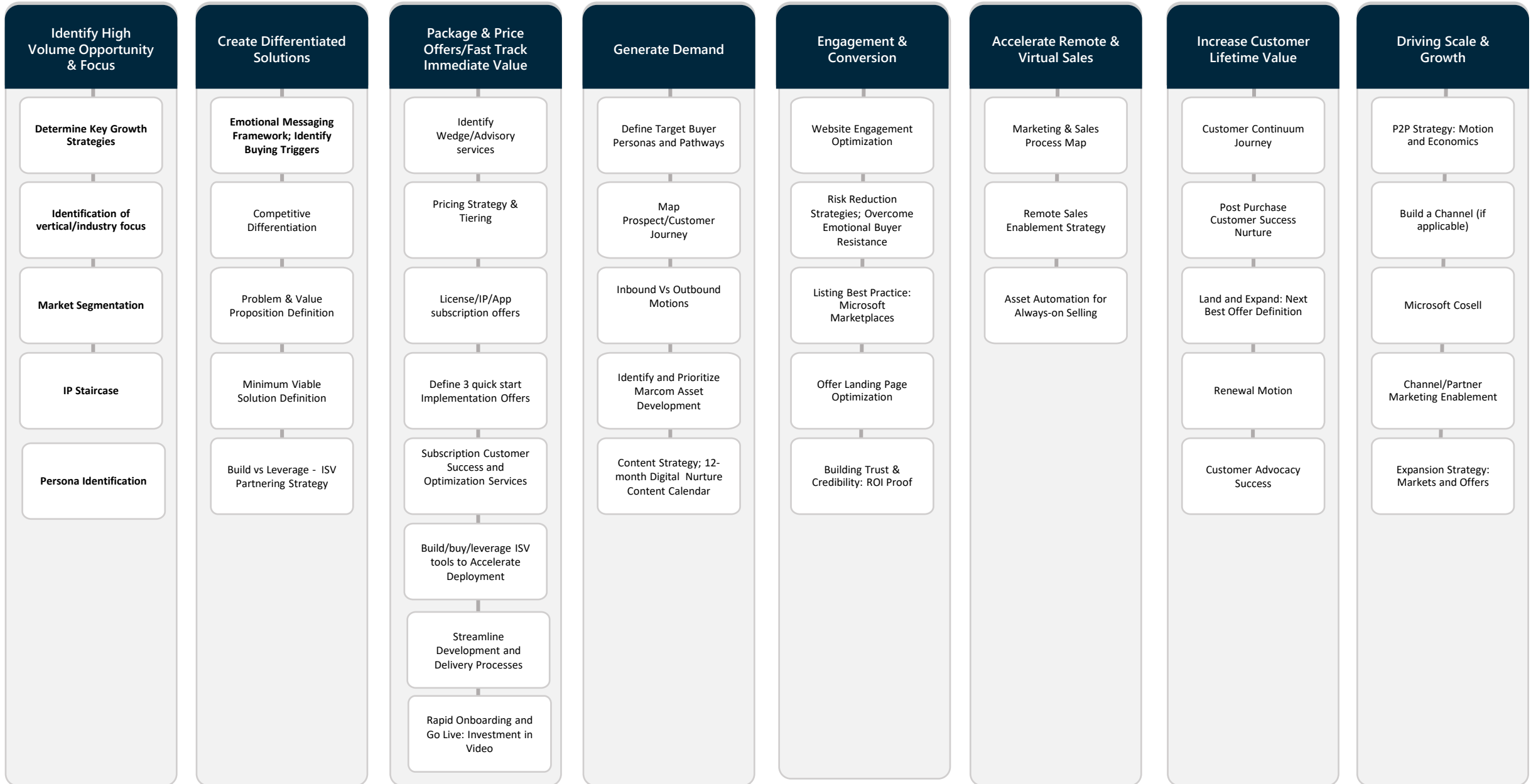
## SaaS Metrics

- Growth Average Recurring Revenue (ARR)
- % YoY Growth i.e. 50-200%
- Subscriber Growth
- Average customer acquisition cost CAC
- Gross Margin i.e. 33%+
- Operating Profit Margin (Sales-CGS-Op. Exp (G&A))
- Net Profit Margin (all + taxes/interest, non op.)
- S&M as % of Revenue 35-40%
- R&D 13-15%
- G&A 7-9%
- Churn <10%
- Average Revenue Per User (ARPU) (reflects Value)
- Customer Lifetime Value

High Volume Transformation Key Metrics	Average High Volume Business Model and Motion
Full Time Sales Resources	3.8
Marketing Resources	2.1
New Customer Ads/year	23
Annual Revenue Growth	37%
Average Deal Size (annualized)	\$66,271
Length of Sales Cycle (Days to Close)	81
Hours spent by Sales Professional to close customer	28.7
Average project services margins	33%
Win Rate	39%
Marketing Investment (videos, digital, SEO)	3%
Qualified Prospects	6
Leads / Month	20
Days to implement a 20-40 user deal	102

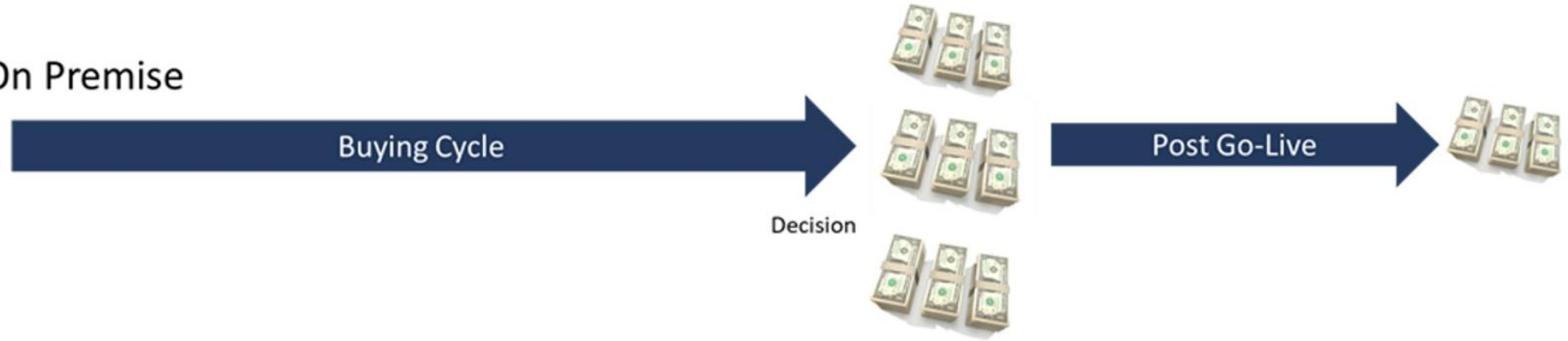
Source: Neural Impact, March 2023





# Model Disruption

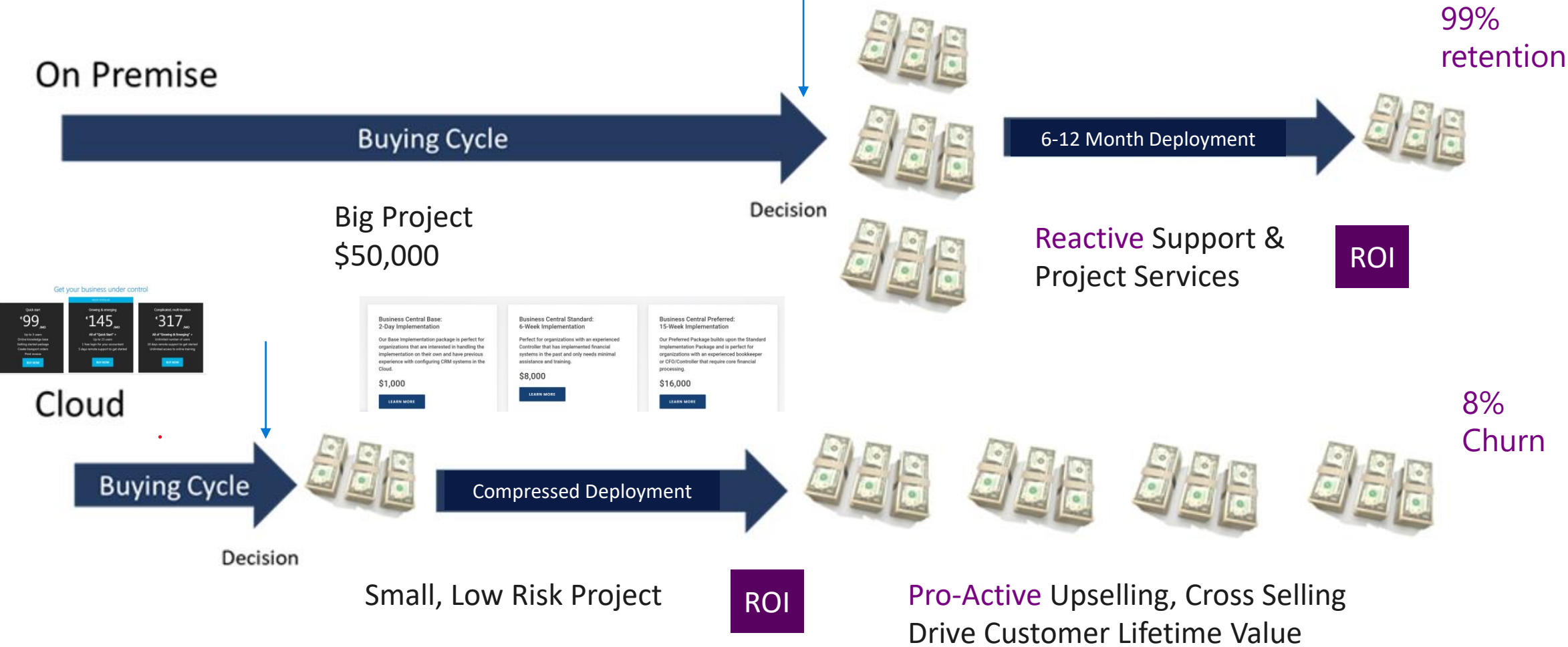
On Premise



Cloud



# Disrupting the Traditional Project Services Model



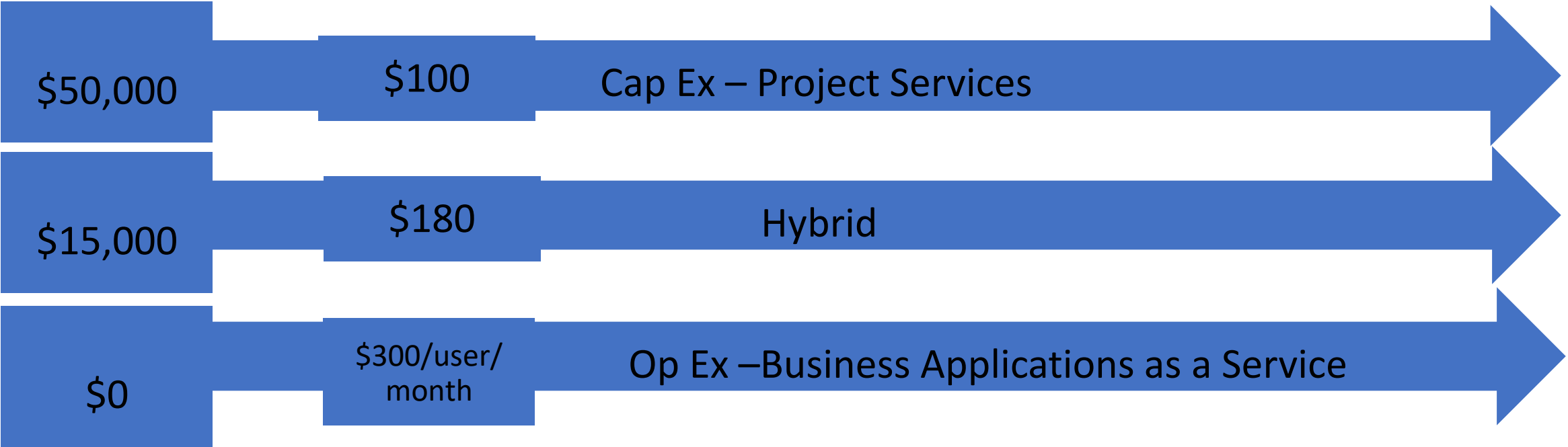
# Business Applications as a Service

Give me  
more choice!



| [CONTACT US](#) | [PARTNERS](#) | [SUPPORT](#) | [EN-US](#)

[Request Demo >>](#)





# High Volume Capability Framework

© 2020 Neural Impact

Identify High  
Volume Opportunity  
& Focus

Create Differentiated  
Solutions

Package & Price  
Offers/Fast Track  
Immediate Value

Generate Demand

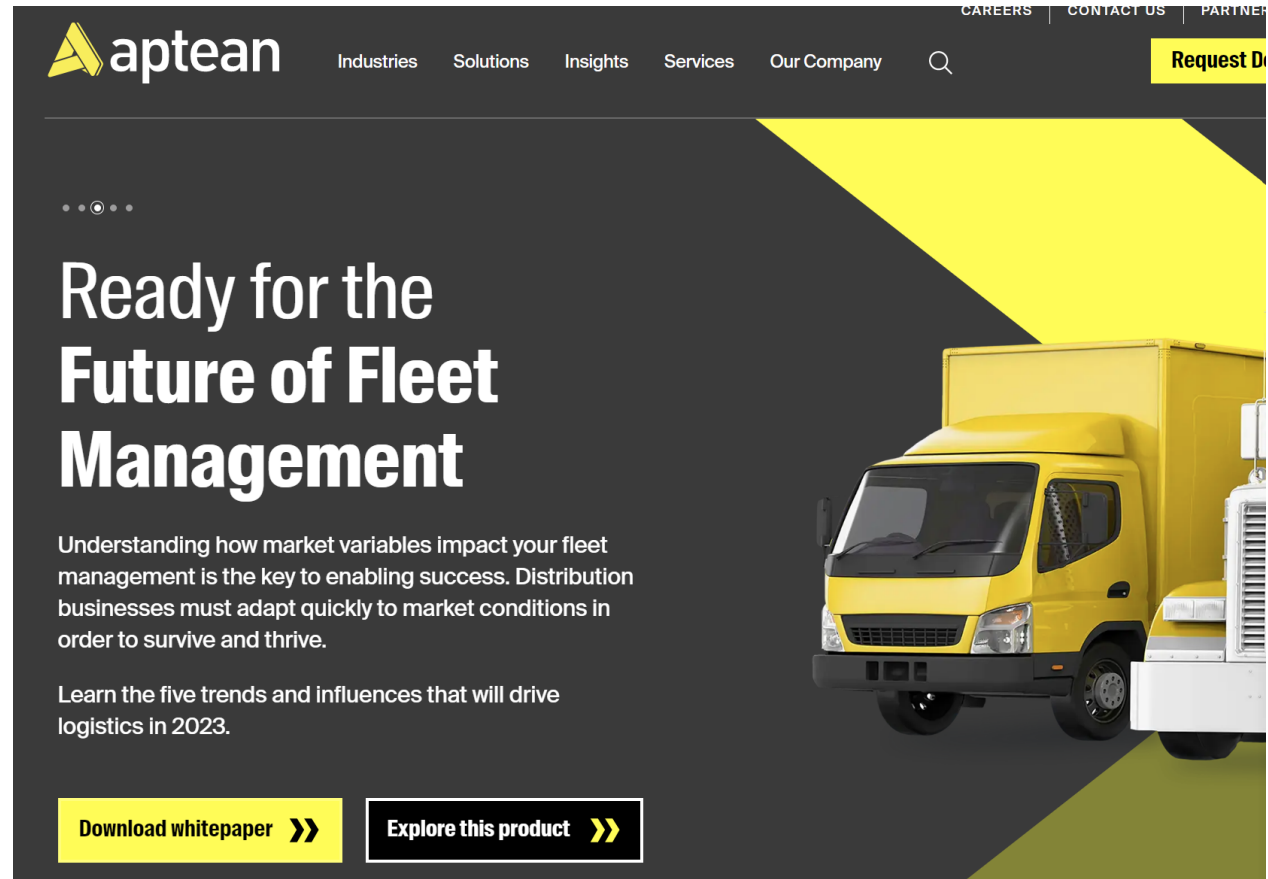
Engagement &  
Conversion

Accelerate Remote &  
Virtual Sales

Increase Customer  
Lifetime Value

Driving Scale &  
Growth

Identify High  
Volume Opportunity  
& Focus



CAREERS | CONTACT US | PARTNER

**apteen** Industries Solutions Insights Services Our Company

[Request Demo](#)

## Ready for the Future of Fleet Management

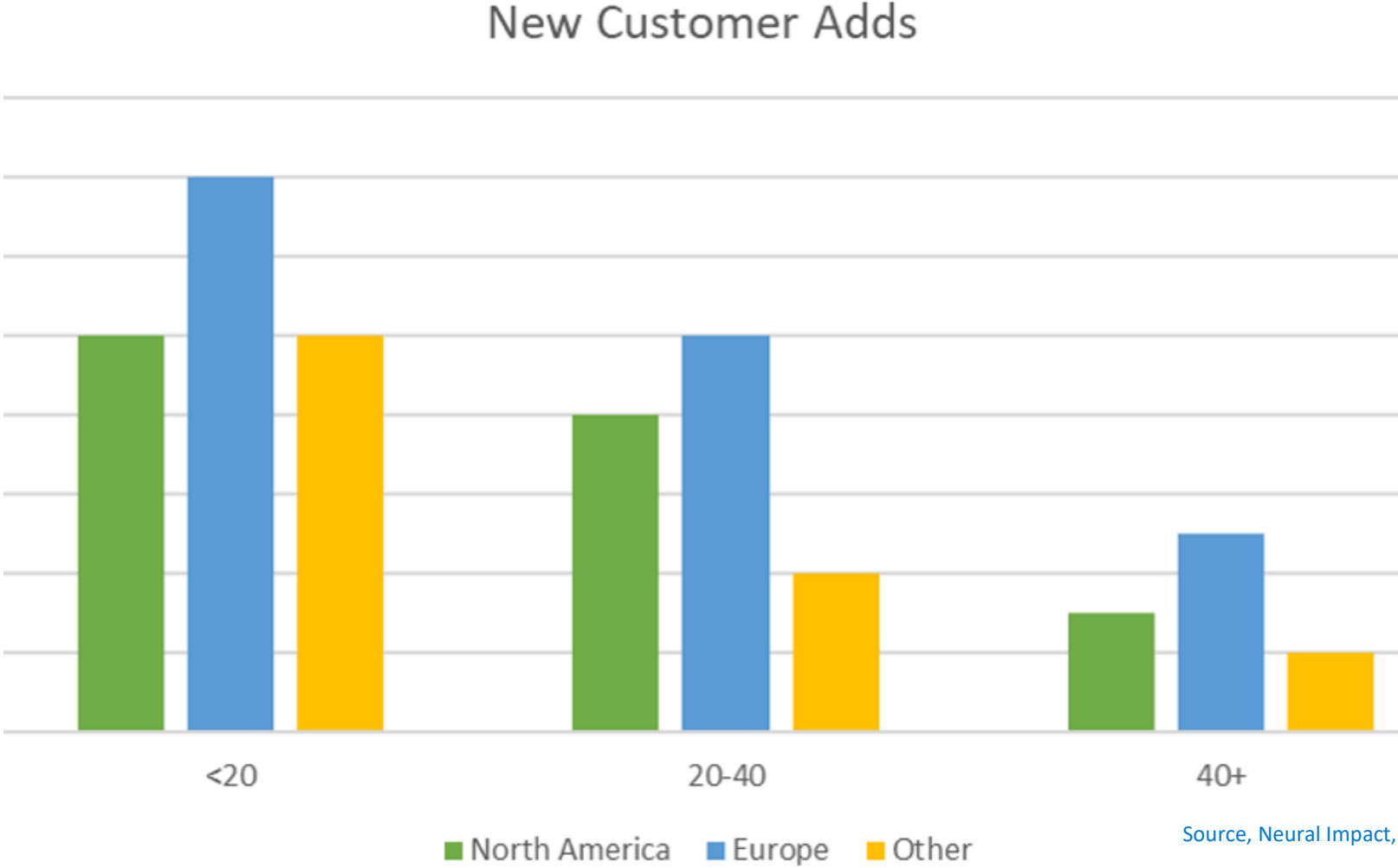
Understanding how market variables impact your fleet management is the key to enabling success. Distribution businesses must adapt quickly to market conditions in order to survive and thrive.

Learn the five trends and influences that will drive logistics in 2023.

[Download whitepaper >>](#) [Explore this product >>](#)

<https://www.apteen.com/en-US>

# New Customer Ads in the Last Fiscal



Source, Neural Impact, March 2022

HubSpot

# Race to Cloud

ZOHIO



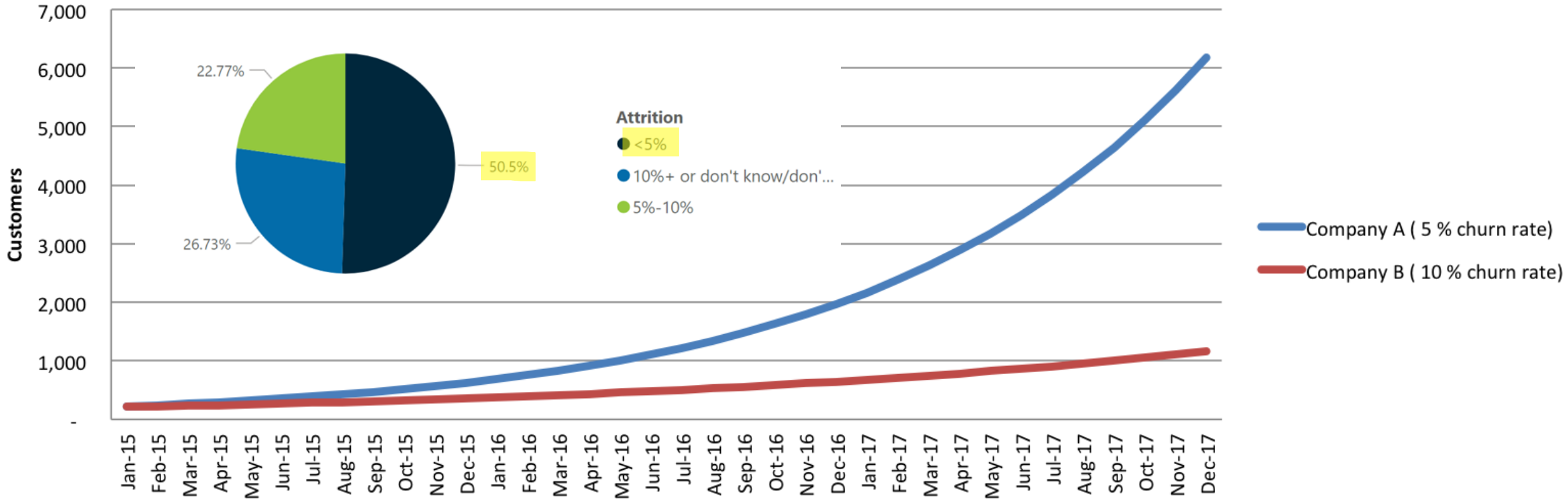
salesforce

intuit  
quickbooks.

ORACLE NETSUITE

# Churn Rate



## Compounding Impact of Churn





# Churn

## Retention for different customer segments

	 <b>SMB</b>	 <b>Midmarket</b>	 <b>Enterprise</b>
Average ACV	<b>&lt;\$12k</b>	<b>\$12 – \$50K</b>	<b>\$50K+</b>
Gross Retention	<b>70 – 80%</b>	<b>80 – 90%</b>	<b>90%+</b>
Net Retention	<b>80 – 100%</b>	<b>90 – 120%</b>	<b>100%+</b>

# High Volume Capability Framework

© 2020 Neural Impact

Identify High Volume Opportunity & Focus

Create Differentiated Solutions

Package & Price Offers/Fast Track Immediate Value

Generate Demand

Engagement & Conversion

Accelerate Remote & Virtual Sales

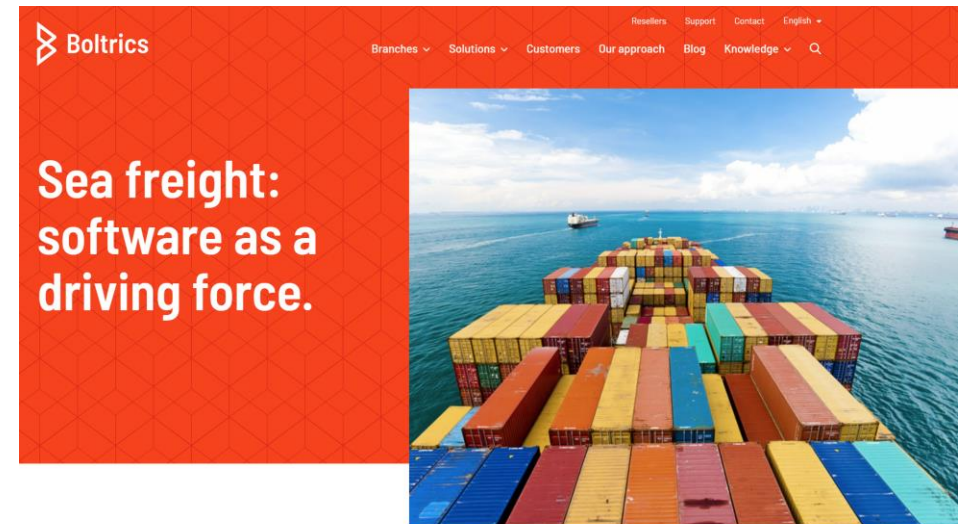
Increase Customer Lifetime Value

Driving Scale & Growth

Create Differentiated Solutions



The screenshot shows the Apteon website's 'Industries' page. The header includes the Apteon logo and navigation links for 'Industries', 'Solutions', 'Insights', 'Services', and 'Our Comp'. The main heading is 'Industries', followed by the text 'Tailored solutions designed for your unique industry challenges'. Below this is a photograph of a grocery bag filled with fresh produce like lemons, ginger, tomatoes, avocados, and bananas. The category 'Food and Beverage' is listed at the bottom.



The screenshot shows the Boltrics website's 'Sea freight' page. The header features the Boltrics logo and navigation links for 'Branches', 'Solutions', 'Customers', 'Our approach', 'Blog', 'Knowledge', and a search icon. The main heading is 'Sea freight: software as a driving force.' Below the text is a photograph of a large cargo ship's deck stacked with colorful shipping containers.

Sea freight forwarding software

# Buying Decision

# Emotional

Fear      Safety  
Resistance      Risk  
Control      Loss

# Logical



Features  
Quality  
Price  
Functionality



ORACLE NETSUITE

# The #1 Cloud ERP Software

Trusted by More Than 34K Customers Worldwide



[Oracle NetSuite](#)

WHAT'S NEW: BLOG - STREAMLINE OPERATIONS AND CONSOLIDATE REPORTING WITH MICROSOFT DYNAMICS 365 BUSINESS CENTRAL + COMMERCE7

**oztera** ABOUT US ▾ INDUSTRIES ▾ SOLUTIONS ▾ SERVICES INTEGRATIONS BLOG CONTACT

## FROM CONTRACT TO DELIVERY

Plan and Manage your crops in a seamless manner with full financial visibility.

BOOK A DEMO

A person is shown from the side, using a tablet computer in a field of green crops. The image is overlaid with several yellow sticky notes of various sizes. The background is a bright blue sky and green field.

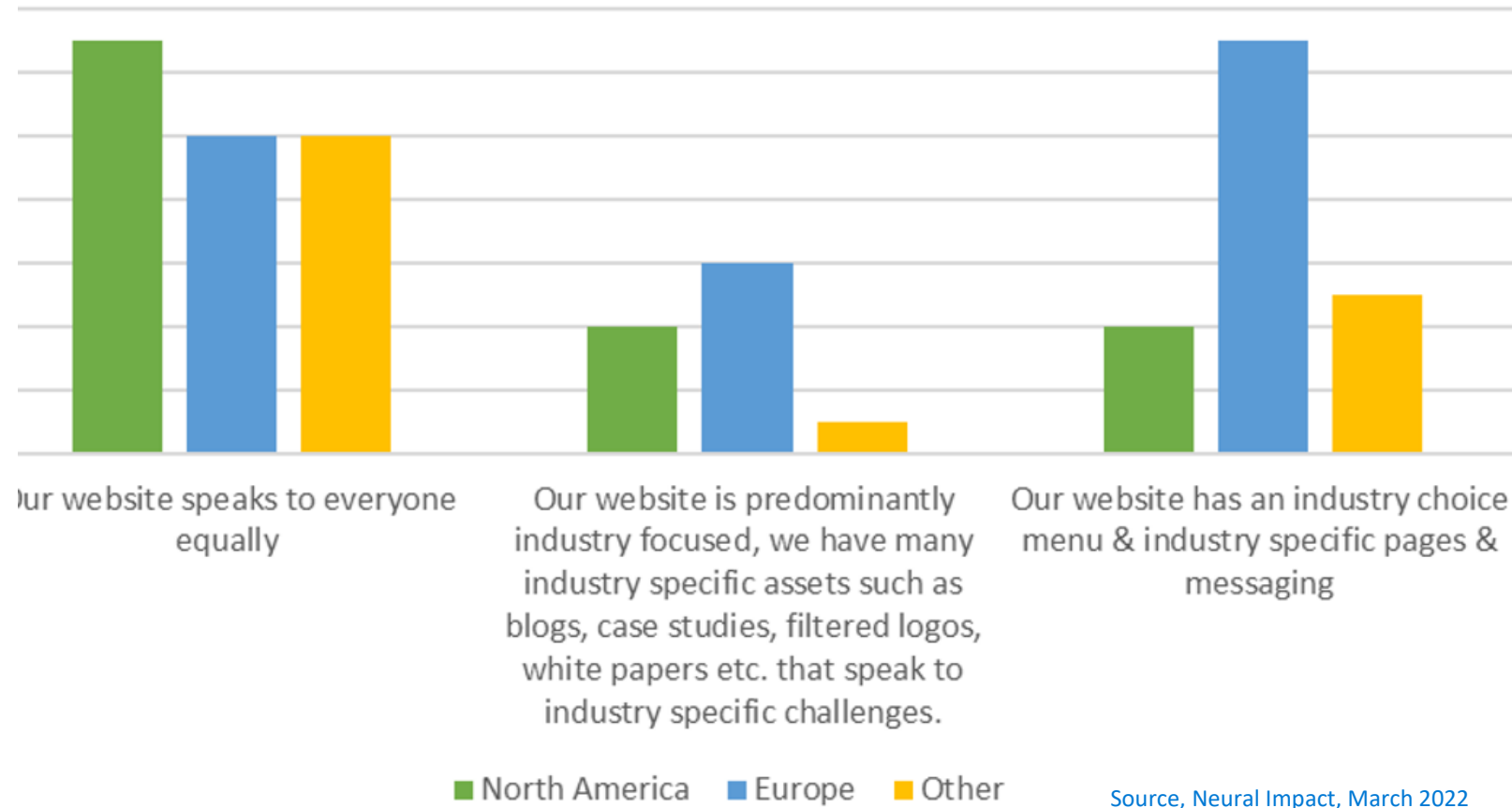
## Meet AgTracker for Microsoft Dynamics Business Central

[Growers & Agriculture - Oztera](#)

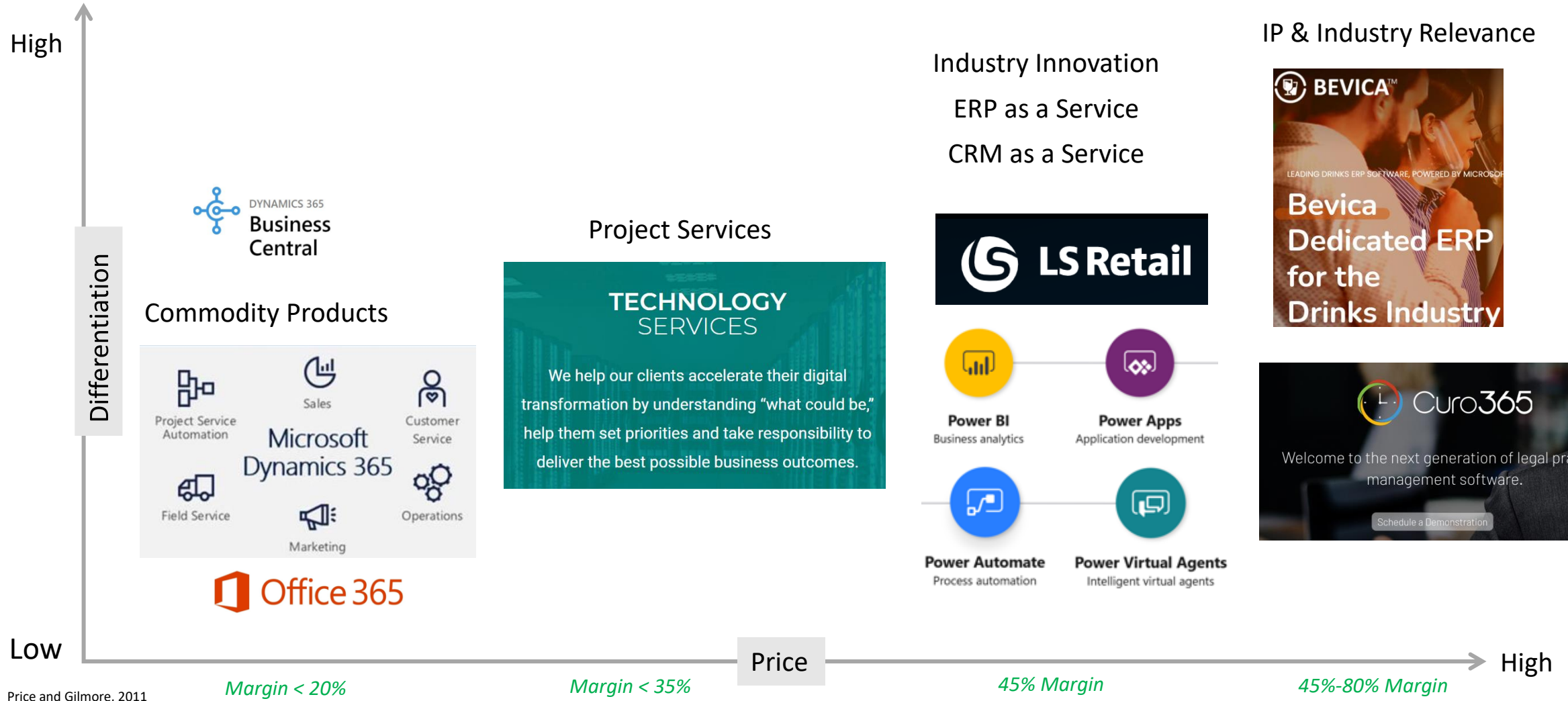


# Differentiation: Industry Go To Market

Industry Go-To-Market Strategy

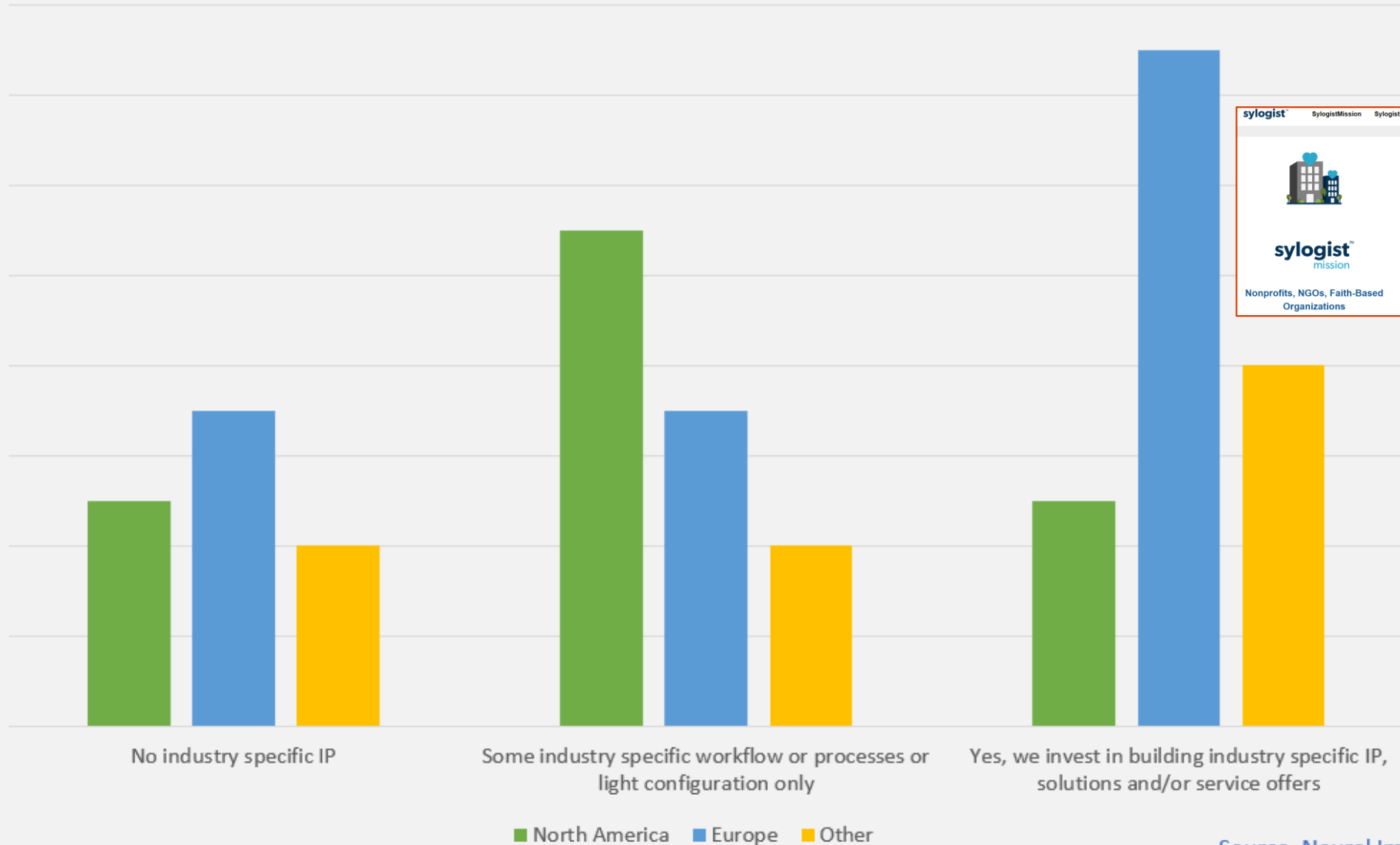


# Progression of Economic Value



Price and Gilmore, 2011

# Industry IP

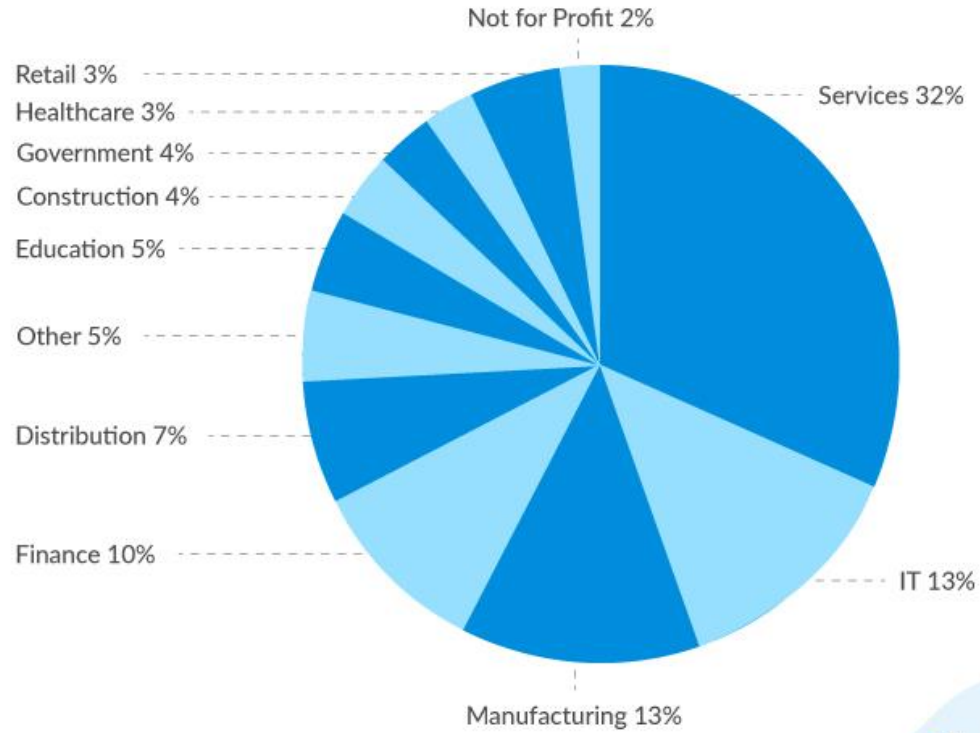


Source, Neural Impact, March 2022



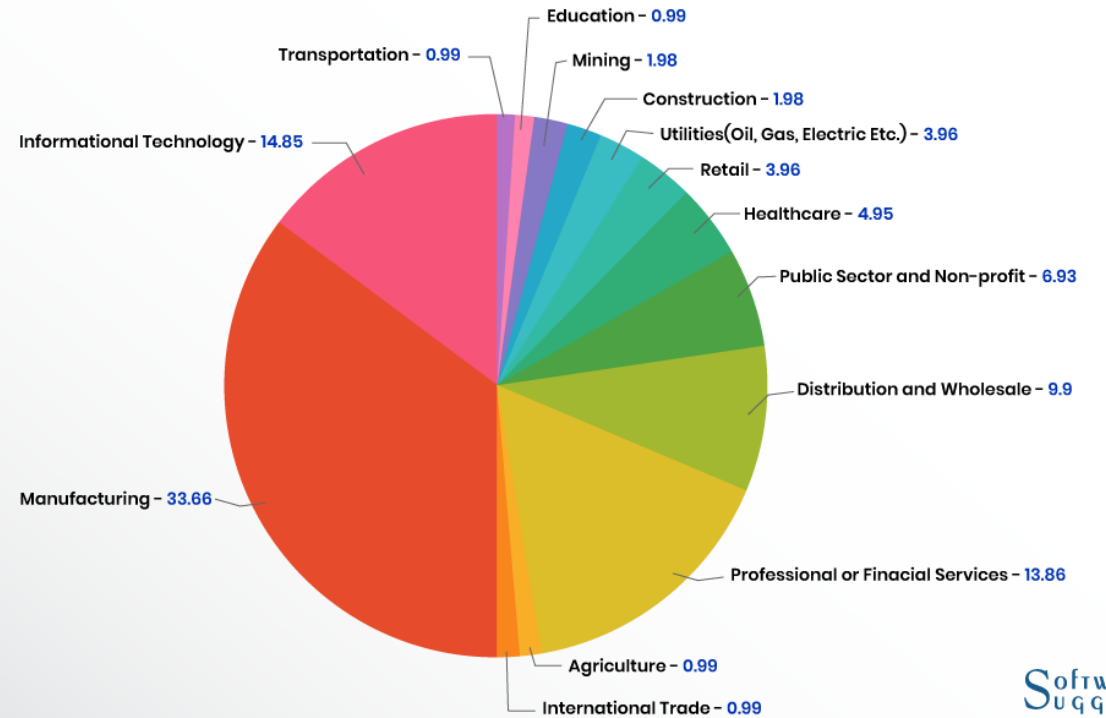
# CRM Buyer Survey

## Respondent Breakdown by Industry



SelectHub

## ERP Software Used by Industries



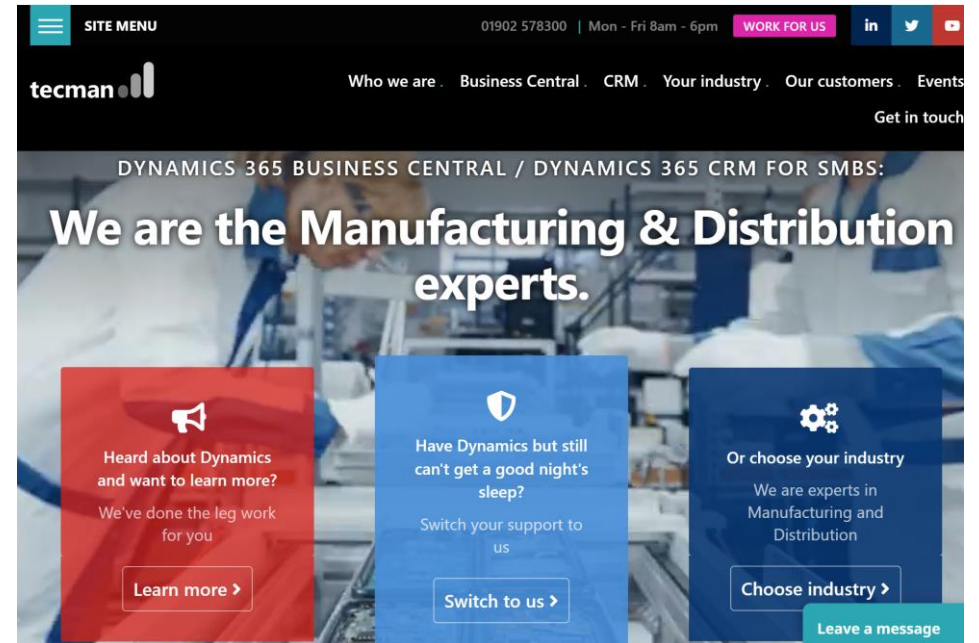
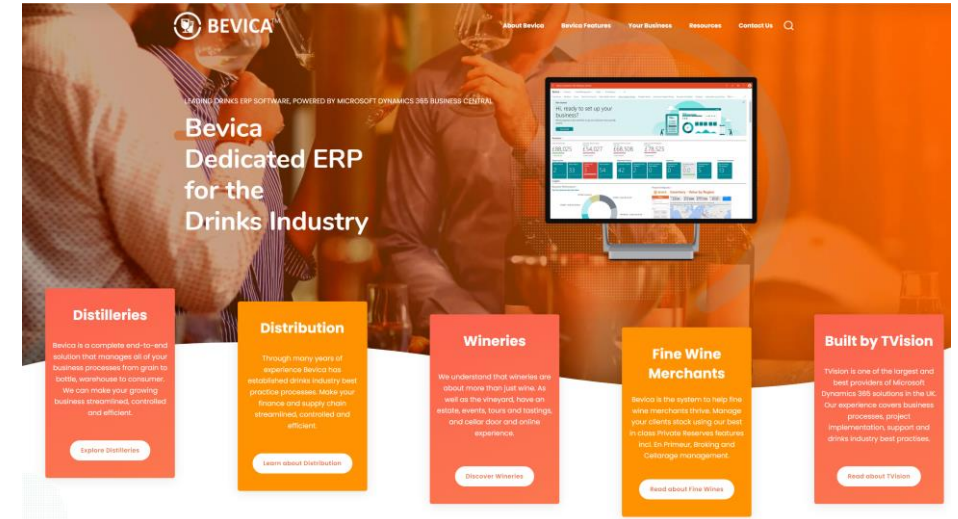
SOFTWARE®  
SUGGEST

Figure-3.jpg (750x617) (selecthub.com)



<https://www.serenic.com/our-customers/npo/>

# Accelerated Core Foundation



# Core Industry

k3  
pebblestone

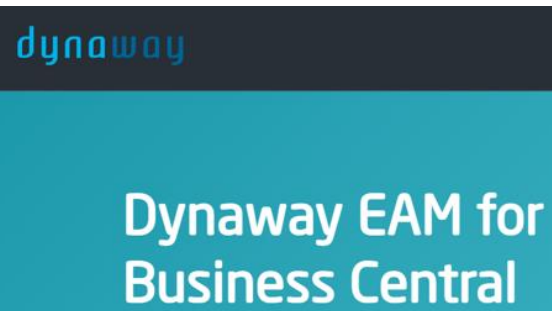


SERENIC  
NAVIGATOR™  
By SERENIC SOFTWARE



# Extend/Close Gaps

## ISV



**ONE**  
SMART CONFIGURABLE SOFTWARE

Binary Stream

Greenshades Platform Who We Serve  
**Payroll and HR**

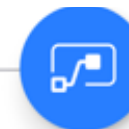
# Optimization as a Service



**Power BI**  
Business analytics



**Power Apps**  
Application development



**Power Automate**  
Process automation



**Power Virtual Agents**  
Intelligent virtual agents

abakion

Home Business Central Apps Partner Program About us

## Apps for Business Central

Abakion has developed a series of apps for Microsoft Dynamics 365 Business Central that replaces your old customizations and expands your functionality within finance, supply chain management and manufacturing.

Our apps are available on Microsoft AppSource, approved by Microsoft, and you get a 60-days free trial when installing from Microsoft AppSource.

These are some of the most popular apps, you can add to your Business Central:

- Customization tool (3)
- Data tool (5)
- Finance (10)
- Inventory (6)
- Manufacturing (12)
- Planning (14)
- Purchase (12)
- Sales (16)
- Warehouse (6)

# Worldwide SMB market Opportunity



**78M**

—  
SMB Organizations  
worldwide\*



**\$17B**

—  
SMB SaaS market  
opportunity



**X3\$**

—  
Services



**X10\$**

—  
Services  
IP  
Margins  
Incentives

SOURCE: IDC

\*Does not include single-person proprietorships



# High Volume Capability Framework

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# Why Fixed Implementation Packages?

## For You

Better qualified leads

Higher than 35% margin

Lower selling costs

Less no decisions

Less discounting

Increase emotional differentiation

Shorter sales cycle

Less deals lost to competitors

## For Your Customers

Risk

# Prices are Anchored Low

The screenshot shows the QuickBooks pricing page with the following details:

- Navigation:** Products & Features, Plans & Pricing, Learn & Support, Talk to Sales: 1-877-823-3327
- Section Header:** Plans for every kind of business
- Progress:** 1 Select plan, 2 Add Payroll (optional), 3 Checkout
- Options:** Buy now and save 50% for 3 months\* (selected), Try it free for 30 days
- Plans:**
  - Simple Start:** \$25, ~~\$25~~, **\$12<sup>50</sup>/mo**
  - Essentials:** \$50, ~~\$50~~, **\$25/mo**
  - Plus:** \$80, ~~\$80~~, **\$40/mo** (Most Popular)
  - Advanced:** \$180, ~~\$180~~, **\$90/mo**
- Features:** Each plan lists features such as Income and expenses, Invoice and payments, Tax deductions, General reports, Receipt capture, Mileage tracking, Cash flow, Sales and sales tax, Estimates, and Contractors.

The screenshot shows the Microsoft Dynamics 365 Pricing & Licensing page with the following details:

- Navigation:** SOLUTIONS, SERVICES, INDUSTRIES, RESOURCES, ABOUT US, CONTACT US
- Section Header:** Microsoft Dynamics 365 Pricing & Licensing
- Text:** Dynamics 365 Business Central simplifies licensing of business applications
- Section Header:** Dynamics 365 Business Central Pricing & Licensing
- Text:** Take the next steps for your business. Dynamics 365 pricing has been simplified to embody Microsoft's goal to provide access to their business solutions for SMBs. Dynamics 365 Business Central is sold and implemented through a global network of Dynamics 365 partners with industry expertise, just like ourselves at Technology Management Concepts. We can help you navigate the best digital practices that tailored to your company. Dynamics 365 offers a solutions to such digital initiatives in today's competitive global marketplace: The cloud-based software (Azure hosted) provides both a Business Central Edition (formerly known as Dynamics NAV) aimed at SMBs as well as an ERP platform for medium to large companies. Connect with a Microsoft Dynamics partner to request a demo and further evaluate the solution capabilities and pricing.
- Text:** Microsoft Dynamics 365 pricing and licensing fit the needs of Small and Midsize Businesses with core business needs. It helps organizations connect their financials, sales, service, and operations. For organizations of any size that have more sophisticated needs, Dynamics 365 offers a variety of applications including Marketing, Sales, Service, Finance, Operations, and Talent.
- Price Tiers:**
  - Dynamics 365 Business Central Team Members user:** From **\$8**
  - Dynamics 365 Business Central Essentials user:** From **\$70**
  - Dynamics 365 Business Central Premium user:** From **\$100**

# Reduce risk, qualify, get a bias towards you



## Dynamics 365 Business Central Fixed-Fee Implementation Plans

Microsoft Dynamics 365 Business Central is a business management solution for small and mid-sized organizations that automates and streamlines business processes and helps you manage your business. Signing up is easy, and you can migrate existing business data from your legacy system.

What does a typical Dynamics implementation look like?

View our other Dynamics 365 implementation plans

### Get Started with Microsoft Dynamics 365!

First Name \*

Last Name \*

Email \*

Dynamics 365 Plan \*

GET STARTED!

### Core Financials

- General ledger (1 company)
- AP (cheque w/o eft)
- AR (simple receivables entry)
- Banking (w/ manual reconciliation)
- Multi-Currency
- Out of the box financial reports
- Data conversion (Customers, Vendors, open AP, open AR, GL (1 year of history), Chart of Accounts)
- Web/live remote training
- Core Financials Jet Reports - [See sample reports](#)

#### \$13,440 - 4 WK IMPLEMENTATION

(For Customers that require Sales Quotes, Orders and Invoices of non-inventory items (text), the implementation fees will be \$20,160 and a timeline of 6 weeks.)

(For customers that opt out of Jet Reports, an additional \$2,000 will be added to the implementation price.)

Get This Plan

### Finance + Distribution

- Core Financials +
- Inventory and Non-stock items
- Quotes, Sales orders, invoices
- Purchase Orders, Receiving
- Warehousing w/ bins (pick/pack/putaway)
- Open invoice data conversion
- FIFO costing
- Lot tracking / serialization (if applicable)
- Data conversion (Items, Inventory Qtys, Price List, Open Invoices, Open Orders, Open Purchase Orders)
- Web/live remote training
- Core Financials - [See sample reports](#)
- Optional: WebSan's Premium Accelerator Package - [Learn more](#)

#### \$24,480 - 8 WK IMPLEMENTATION

(For customers that opt out of Jet Reports, an additional \$5,000 will be added to the implementation price.)

Get This Plan

### Jobs & Project Costing

- Finance & Distribution +
- Jobs
- Timesheets w/ approvals (team member license)
- Open jobs data conversion
- Work in Progress - WIP
- Revenue Recognition
- Project Invoice
- Data conversion (Jobs in Progress, Tasks, Resources (Employees))
- Web/live remote training
- Core Financials Jet Reports - [See sample reports](#)

#### \$39,600 - 12 WK IMPLEMENTATION

(For customers that opt out of Jet Reports, an additional \$2,000 will be added to the implementation price.)

Get This Plan

### Manufacturing

- Core Financials +
- Finance & Distribution +
- Requisition Worksheet
- Inventory planning/MRP
- Production Orders w/ manual and/or automated backflushing
- BOMs, Routings
- Capacity Planning
- Data conversion for BOMs, Routings and open Production Orders
- Data conversion for inventory item planning parameters and stock keeping units
- Web/live remote training
- Core Financials Jet Reports - [See sample reports](#)
- Optional: WebSan's Premium Accelerator Package - [Learn more](#)

#### \$70,800 - 16 WK IMPLEMENTATION

(\$46,320 Manufacturing + \$24,480 Distribution & Core Financials)

(For customers that opt out of Jet Reports, an additional \$5,000 will be added to the implementation price.)

Get This Plan















The PowerPack Catalog

Please note that while many of these add-ons will work together, they do need to be individually imported into Dynamics 365, empowering you to select only the add-ons that will benefit your organization.

Select a category:

Any  Marketing Automation  Productivity

 <p><b>PowerAutoNumber</b></p> <p>Automatically insert numbers, letters, dates, times, or field values into any field of any entity within Microsoft Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerBulkDelete</b></p> <p>Quickly deploy bulk delete rules for predefined out of the box D365 entities from a single page.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerCalendar</b></p> <p>View team tasks, appointments, and phone calls all on one calendar inside of Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerCharge</b></p> <p>Securely store and process credit cards within Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>
 <p><b>PowerChat</b></p> <p>Live chat and track conversations from visitors on your website within Microsoft Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerConstantContact</b></p> <p>Combine the powers of Dynamics 365 and Constant Contact to streamline your customer engagement process.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerCTI</b></p> <p>Automatically open a caller's record within Dynamics 365 when a phone call is received.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerEmail</b></p> <p>Easily track opens and URL clicks of emails sent from Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>
 <p><b>PowerGlobalSearch</b></p> <p>Search across any entity and field instantly. View results in a convenient and configurable reading pane.</p>	 <p><b>PowerGrid</b></p> <p>Search for and edit records inline within Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerHashTag</b></p> <p>Create and assign keywords to categorize Dynamics 365 records.</p> <p><a href="#">LEARN MORE</a></p>	 <p><b>PowerLastActivity</b></p> <p>Track the last activity type, date and time directly on an entity form in CRM for Dynamics 365.</p> <p><a href="#">LEARN MORE</a></p>











[PowerPack Microsoft Dynamics Add Ons from HCLTech | HCLTech](#)

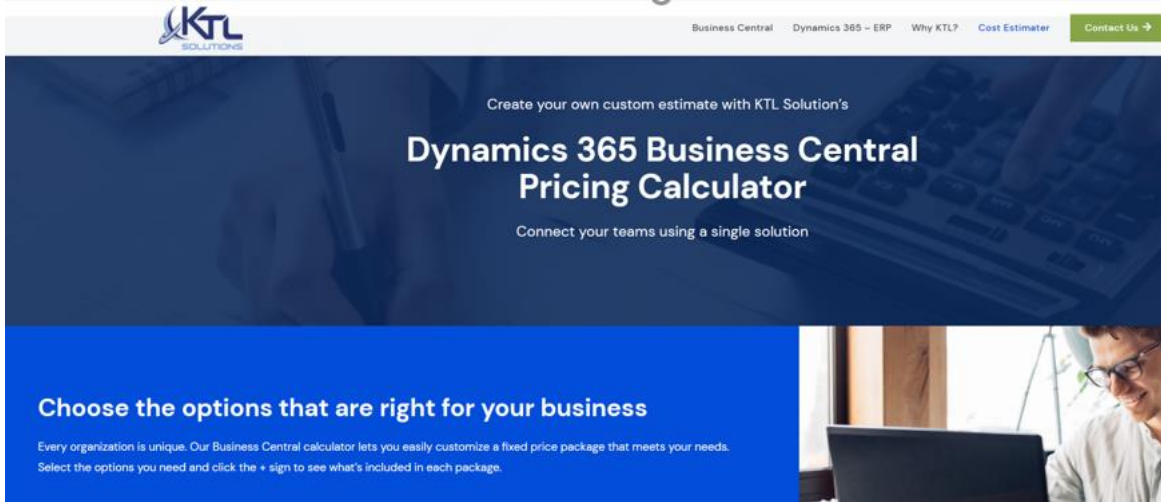
Apps for Business Central

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Our apps are available on Microsoft AppSource, approved by Microsoft, and you get a 60-days free trial when installing from Microsoft AppSource.

These are some of the most popular apps, you can add to your Business Central:

 <p><b>Document Customizer</b></p> <p>The easy way to customize and layout documents, including best practice package with the most commonly used outgoing documents.</p> <p><a href="#">Read more</a></p>	 <p><b>Document Handling</b></p> <p>A full-featured solution to send personalized emails your recipients will trust – with documents attached from Business Central.</p> <p><a href="#">Read more</a></p>	 <p><b>Dynamic Data Exchange</b></p> <p>A powerful yet simple way to set up integrations and data imports – saving money on developing custom import functionality.</p> <p><a href="#">Read more</a></p>	 <p><b>Master Data Information</b></p> <p>Define your own master data structure with no customizations. The easy way to enable Master Data Management in Business Central.</p> <p><a href="#">Read more</a></p>	 <p><b>App Bundle</b></p> <p>Pick any 5 apps for Business Central, and get all the functionality you would traditionally hire a consultant to customize.</p> <p><a href="#">Read more</a></p>
 <p><b>Assign Quantity</b></p> <p>Fulfill all Sales Orders intelligently and provide fast and reliable order promises to customers.</p> <p><a href="#">Read more</a></p>	 <p><b>B2B Ecommerce</b></p> <p>Launch a B2B webstore with no integration work and no heavy maintenance.</p> <p><a href="#">Read more</a></p>	 <p><b>Commerce Manager</b></p> <p>Automated mgmt of Consignment, Replenishment with a unified interface for automated Sales Order import.</p> <p><a href="#">Read more</a></p>	 <p><b>Created-by on Documents</b></p> <p>The simple and free app that helps you to get insight into who created the original documents – by adding a 'created-by' field.</p> <p><a href="#">Read more</a></p>	 <p><b>Flexible Forecast</b></p> <p>Overview forecast, demands, supplies and history in one view. All in one line per item.</p> <p><a href="#">Read more</a></p>



### Capabilities

### Select Package

### Price

**Core Finance**

Required

\$14,000.00

- Requirements gathering to validate selected modules to implement
- Environment Setup for 1 Company (legal entity)
- General Ledger
- Dimensions
- Accounts Payable
- Accounts Receivable
- 1 Bank Reconciliation (not eBank Rec)
- 1 Bank Account
- Report Layout modification for 1 Sales Invoice and 1 Check format
- Modification includes moving of fields already on forms or adding of standard fields made available by Microsoft out of the box.
- Migration of Data for Chart of Accounts, Customer Master, Vendor Master, Open Balance

**Advanced Finance**

No  Yes

**Advanced Banking**

No  Yes

**Fixed Assets**

No  Yes

**Advanced Reporting with Jet Reports**

No  Yes

**Sales**

No  Yes

**Purchasing**

No  Yes

**Inventory (Requires sales and purchasing)**

No  Yes

### Total Package Estimate

\$14,000.00

### Get a Copy of Your Estimate

# Catapult reinvented consulting and implementation services for the subscription economy.

Subscription packages that include everything you need to get up and running, and transform your business



Lean  
Deployment



On-Demand  
Training



Platform  
Upgrades



Amazing  
Support



Software  
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PACKAGES FROM

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/mo

36-month commitment

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## Dynamics 365 Implementation Packages

We offer implementation and assessment packages across Dynamics 365 Business Central, Dynamics 365 Customer Engagement, and Power BI.

### Business Central Base: 2-Day Implementation

Our Base Implementation package is perfect for organizations that are interested in handling the implementation on their own and have previous experience with configuring CRM systems in the Cloud.

\$1,000

[LEARN MORE](#)

### Business Central Standard: 6-Week Implementation

Perfect for organizations with an experienced Controller that has implemented financial systems in the past and only needs minimal assistance and training.

\$8,000

[LEARN MORE](#)

### Business Central Preferred: 15-Week Implementation

Our Preferred Package builds upon the Standard Implementation Package and is perfect for organizations with an experienced bookkeeper or CFO/Controller that require core financial processing.

\$16,000

[LEARN MORE](#)

<https://bondconsultingservices.com/dynamics-365-implementation-packages/>

## SYNACT Accelerate for Non-Profits Build & Maintain Your Relationships



The non-profit tech space is changing and evolving every day, but the key principle remains the same: modern nonprofits deserve fully-integrated tech stacks with tools that can connect and collaborate.

Microsoft Dynamics 365 provides a platform to help your non-profit achieve your mission by fulfilling strategic goals. Offering a complete view of key relationships with donors, sponsors, and volunteers PLUS campaign and event management, Dynamics 365 results in operational enhancements, cost savings, and real-time intelligence for easy decision-making.

### Quick Start: Accelerate for Non-Profits

The Accelerate offering packages the most essential and effective configurations common to most non-profits. Additionally, as your partner, we provide unlimited training and support to ensure you're making the most of your system. This quick-start program supports up to five licenses of D365. If your organization requires more than 5 users, talk to us about our other programs.



#### Customizations

Configure fields, forms & workflows to make the application your own



#### Ongoing Support

Step-by-step guides, plus unlimited end user support from a real person



#### User Adoption

Materials and resources tailored to your non-profit & adult learning

### Why SYNACT?

The CRM marketplace offers a seemingly infinite supply of software, vendors, and consultants, all promising to make your dreams come true. The status quo remains a tempting option. Due diligence is imperative when the stakes are high; identifying the right software implemented and supported by the best partner, will be critical to your long-term success. Feel confident that partnering with SYNACT to implement Microsoft Dynamics 365 is crucial to executing on your non-profits mission.

### What's Included?

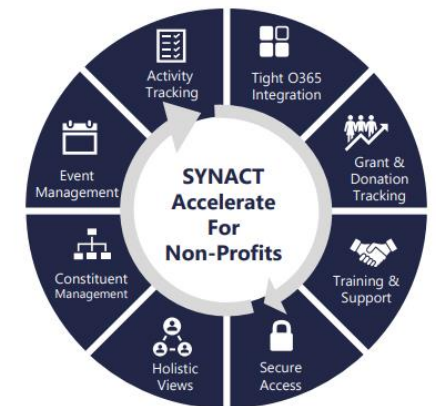
- ✓ Core configurations proven to maximize efficiency & user adoption
- ✓ Key reporting insights to manage your non-profit through D365
- ✓ Support for data migration using the Import Wizard

### Your Investment

\$450/month for SYNACT Accelerate Service



\$17/user/month for Microsoft Dynamics 365 Licenses



\*Must use Microsoft 365 as your email provider

Contact us for additional information  
Starting at \$450/month + licensing

[jordyn.woods@synact.net](mailto:jordyn.woods@synact.net)

585-545-4903 [www.synact.net](http://www.synact.net)

[SYNACT Accelerate](#)



# Migration

## Not sure you're ready to upgrade?

TrellisPoint will migrate up to 10,000 of YOUR Accounts and Contacts from Infor CRM (formerly Saleslogix) to a 30-day free trial of Microsoft Dynamics 365 for Sales (CRM) at no cost or obligation.<sup>1</sup> Why not take the system for a spin? See what you've been missing!

FREE INFOR CRM MIGRATION 30-DAY TRIAL

Looking for a more comprehensive migration that includes more records, record types, and fields? Choose from any of the following packages or contact us for a customized migration quote.

Trial	Silver	Gold	Platinum
<b>Free<sup>2</sup></b>	<b>\$1,990</b>	<b>\$7,990</b>	<b>\$19,990</b>
Accounts, Contacts	Users, Accounts, Contacts	Users, Accounts, Contacts	Users, Accounts, Contacts
<b>INQUIRE</b>	<b>INQUIRE</b>	<b>INQUIRE</b>	<b>INQUIRE</b>
Up to 10,000 records	Up to 100,000 records 1 week lead time	Leads Activities: Email, Tasks, Phone Calls, Appointments Up to 500,000 records 3 weeks lead time	Leads Activities: Email, Tasks, Phone Calls, Appointments Notes & Attachments Up to 1,000,000 records 6 weeks lead time

Identify High  
Volume Opportunity  
& Focus

Create Differentiated  
Solutions

Package & Price  
Offers/Fast Track  
Immediate Value

Generate Demand

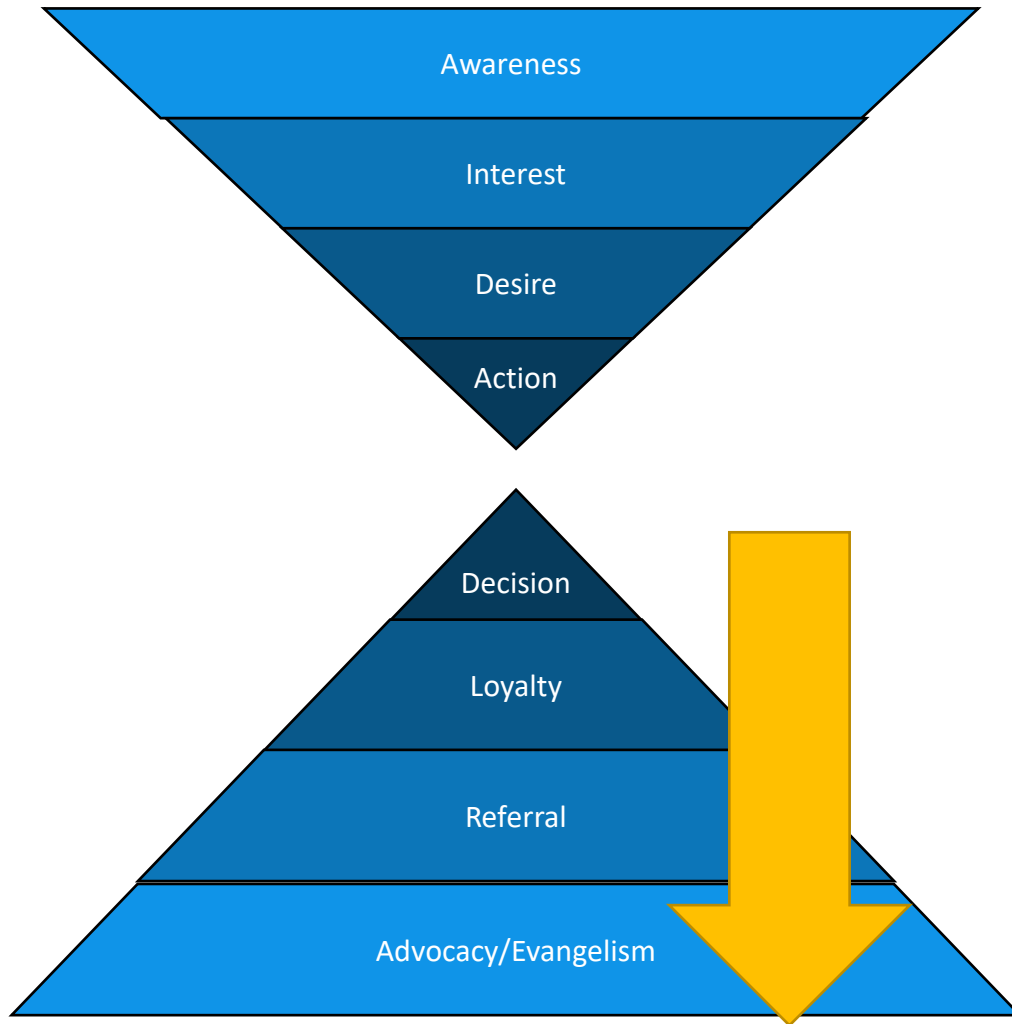
Engagement &  
Conversion

Accelerate Remote &  
Virtual Sales

Increase Customer  
Lifetime Value

Driving Scale &  
Growth

# Drive a Digital Buying Journey



Have you invested in SEO?

Do you need to invest in new searchable content such as blogs and videos?

What high value educational assets can you create to drive online conversion?

Do you provide any special incentives or offers?

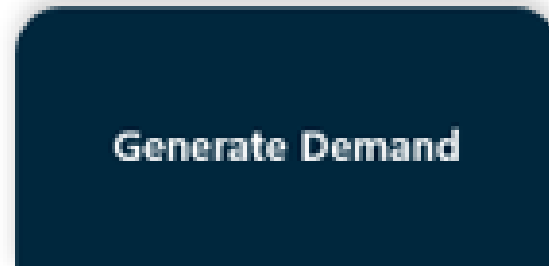
Can you leverage automated email campaigns to help move prospects along their buying journey?

Do you have a customer advocacy program?  
Do you have strong case studies?

Do you have upgrade offers and an expand strategy?

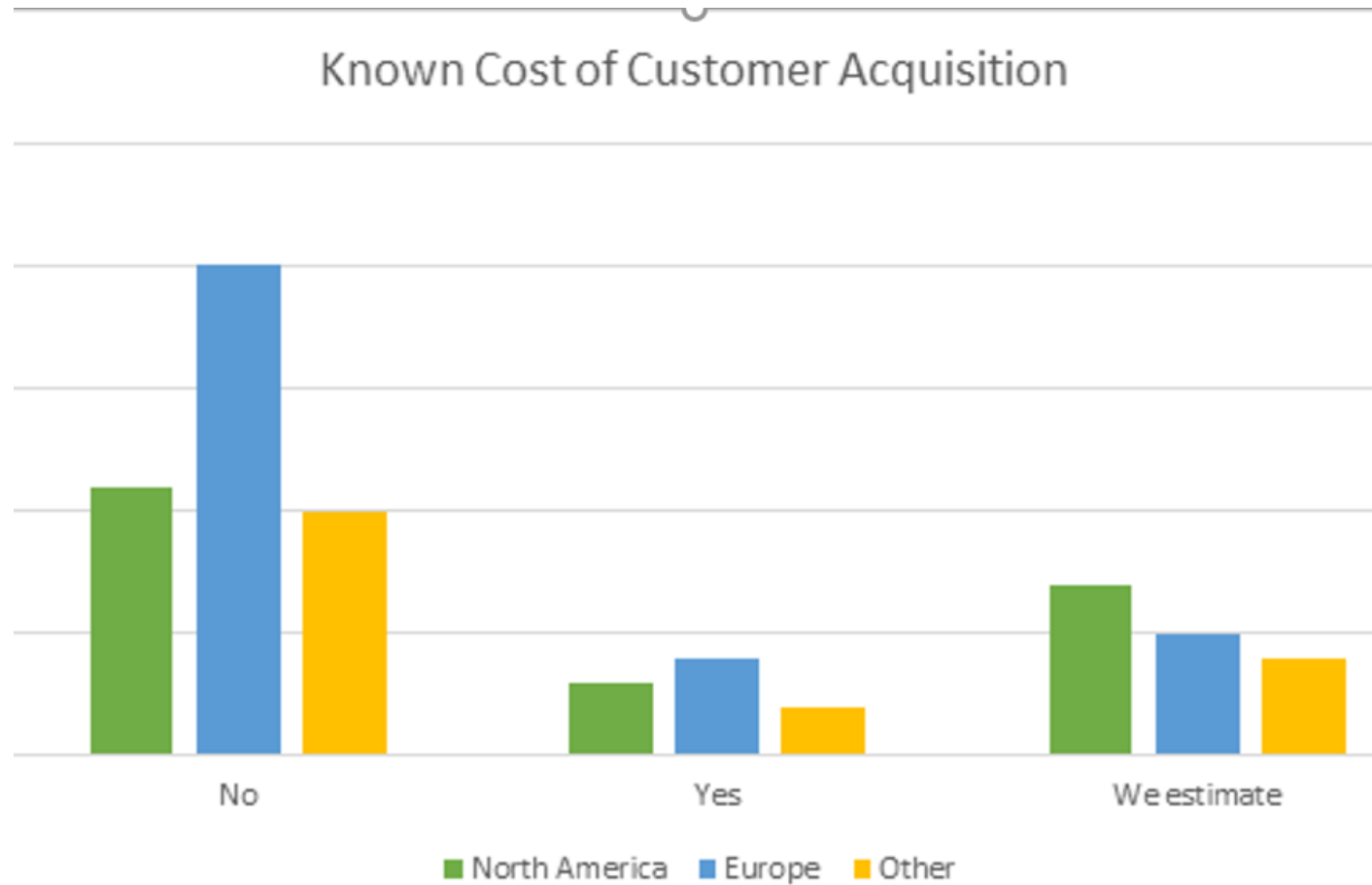
# High Volume Capability Framework

© 2020 Neural Impact





# Cost of Customer Acquisition

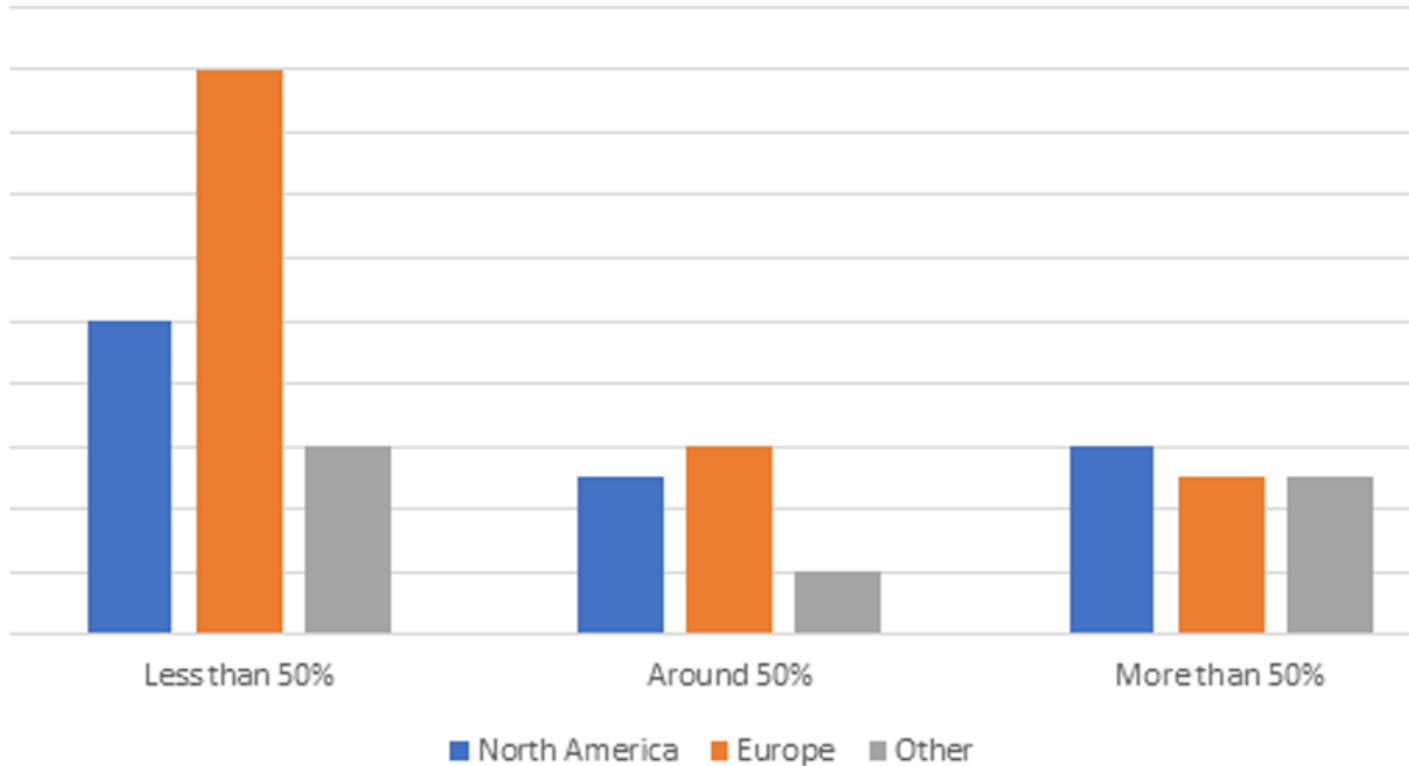


Source, Neural Impact, March 2022

# Under Invested in Marketing

Win Rate	39%
Marketing Investment (videos, digital, SEO)	3%
Qualified Prospects	6
Leads / Month	20

## Dependency on Word of Mouth



Source, Neural Impact, March 2022



eLogic (now Avanade)

2,409 followers

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Dive into 3 key tech trends shaping the future of **#manufacturing** with **Thomas McKee, Jr**, **David Kohar**, and **Ashley Haynes-Gaspar**. Hear their thoughts on Industry Clouds, Industry Data Models, and Consumer Driven Manufacturing: <https://lnkd.in/grSXYhim>

**#industrycloud #intelligententerprise #microsoft #industrydata #manufacturingcloud**

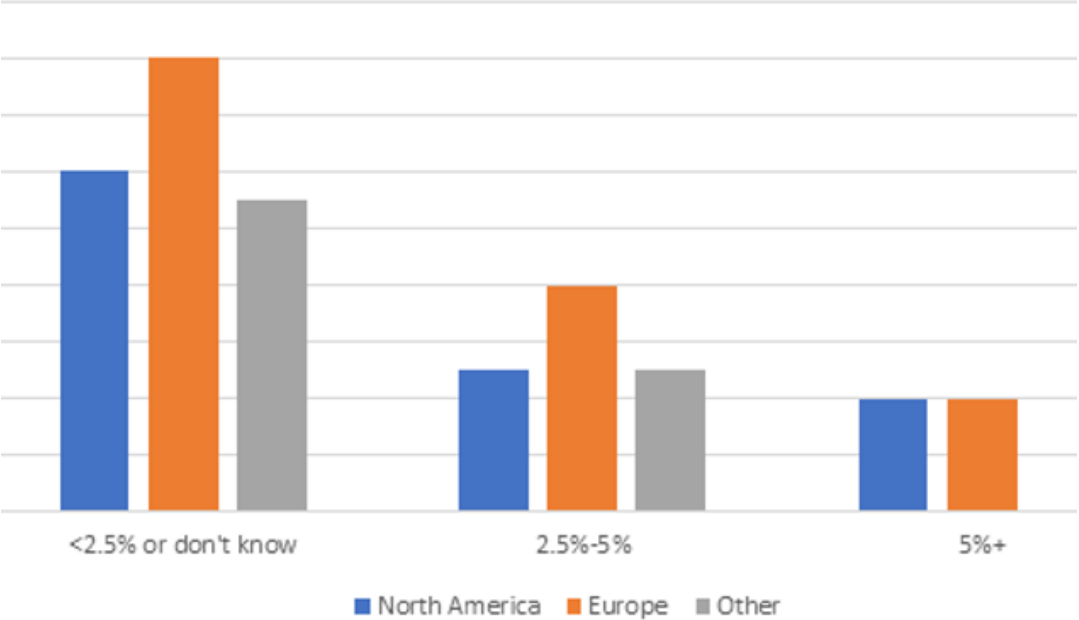
The video player interface displays three speakers in a grid: Tom McKee (top left), Ashley Haynes-Gaspar (top right), and David Kohar (bottom left). To the right of the speakers is a diagram titled 'Microsoft Cloud for Manufacturing' which illustrates a central 'Data Hub' connected to various manufacturing processes and data flows. The diagram includes labels such as 'Operational Visibility', 'Production Operations', 'Planning & Optimization', 'Supply Chain Visibility', 'Always on Service', 'Product Traceability', 'Health & Safety, Wellness', 'Learning & Knowledge Management', 'Connected & Frictionless Worker', 'Asset Productivity', 'Data Models', 'Connectors and APIs', and 'Partner Ecosystems'. The eLogic logo is visible in the bottom right corner of the video frame.

3 Technology Trends Driving Modernization for Manufacturers

eLogic.com • 1 min read

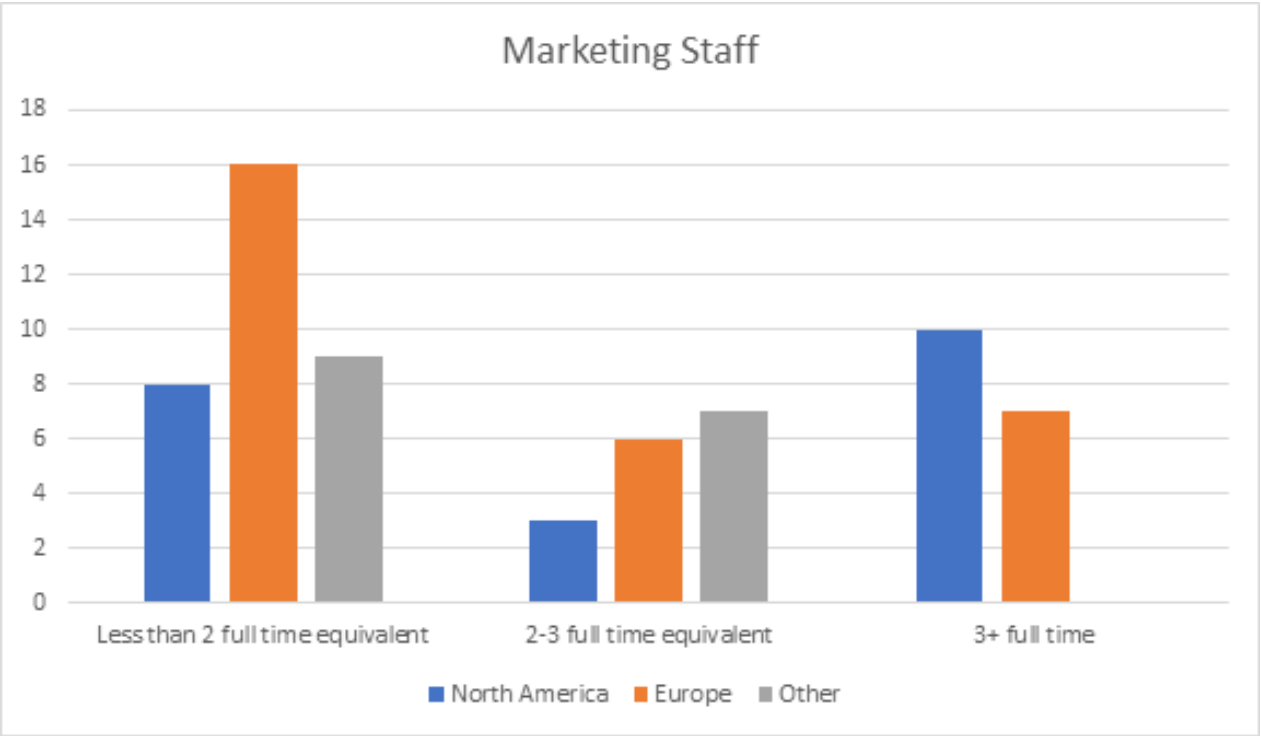
# Under Invested in Marketing

Overall Marketing Budget (% of Revenue)



How many full time equivalent marketing resources do you have, including employees or contract resources?

Marketing Staff



Source, Neural Impact, March 2022



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16 views • 5 days ago

**Sabre Production - Sales and Purchase Line Update Page**  
16 views • 5 days ago

**WHAT'S THE BEST WAY TO IMPLEMENT PHASE 2 IN MICROSOFT BUSINESS CENTRAL ERP**  
with Robert Jaffe  
11:00  
34 views • 12 days ago

**Introduction to Sabre IT Services**  
24 views • 12 days ago

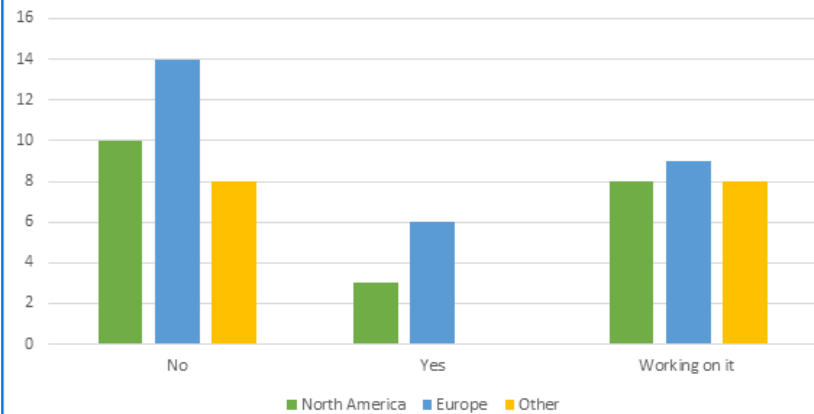
**New Features 2022**  
See Lines in List Pages

**New Features 2022**  
Service Updates – Email Layouts and Service Codes

**BUSINESS CENTRAL**  
**WHAT SHOULD BE IN MY BUSINESS CENTRAL PHASE 1 PROJECT**

**Availability by – Unit of Measure**

Video Strategy



Source Neural Impact 2022

# High Value Educational Content

The image shows a YouTube video player interface. At the top, there is a search bar with the text 'business central pricing'. The video thumbnail features a dark blue background with glowing blue squares and the text 'DYNAMICS 365 BUSINESS CENTRAL LICENSING' in white. Below this, a red speech bubble contains the word 'FICTION' and a green speech bubble contains the word 'FACT', with 'OR' in white text between them. The video player controls at the bottom show a progress bar at 0:05 / 2:45, and the video title 'Dynamics 365 Business Central License Pricing: Fact or Fiction | Sikich' is displayed below the player. The video has 29 views and was posted on Mar 8, 2021. The channel name 'Sikich' and '909 subscribers' are visible at the bottom left, along with a red 'SUBSCRIBE' button.

Home > Technology > CRM and ERP Services

## ERP SERVICES

### STAYING WITH A VINTAGE ERP SOLUTION PUTS YOUR BUSINESS AT RISK.

By the time you decide that it's time to make a switch, the shortcomings of the legacy software may already have contributed to losses in terms of brand value, customer and partner loyalty, revenue, operational expenses, employee burnout, process inefficiencies, and competitive standing

[GET A FREE ASSESSMENT](#)

<https://www.sikich.com/technology/crm-erp-services/>

Identify High  
Volume Opportunity  
& Focus

Create Differentiated  
Solutions

Package & Price  
Offers/Fast Track  
Immediate Value

Generate Demand

Engagement &  
Conversion

Accelerate Remote &  
Virtual Sales

Increase Customer  
Lifetime Value

Driving Scale &  
Growth

Engagement &  
Conversion





## Take the hassle out of stock management

- › No more "on-stock somewhere"; instead have an up-to-the second view of your inventory across every location for more reliable fulfilment and reduced obsolescence.
- › No longer get caught out by non-BOM (Bill of Materials) costs such as packaging or consumables.
- › Take advantage of perpetual stock management for a precise cost of goods sold.
- › Less credit notes issued for missed deadlines or incorrect products.

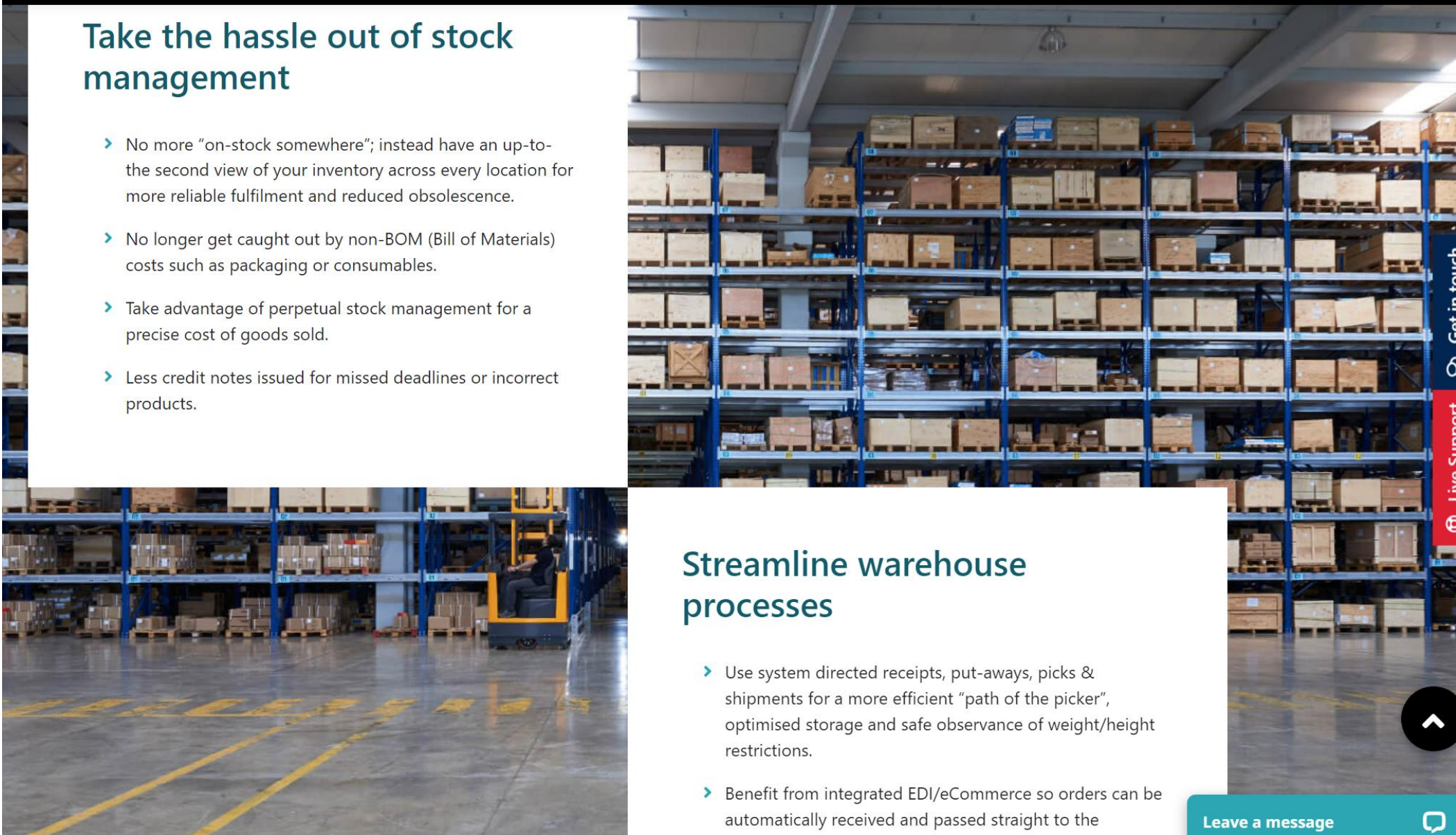
## Streamline warehouse processes

- › Use system directed receipts, put-aways, picks & shipments for a more efficient "path of the picker", optimised storage and safe observance of weight/height restrictions.
- › Benefit from integrated EDI/eCommerce so orders can be automatically received and passed straight to the

Leave a message



# Empathy Problems





# Pain Proof




QAD

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A smooth and successful ERP implementation is possible. Get the insights you need to succeed with this actionable guide. Download today!

An advertisement image showing a man sitting at a desk with a computer monitor, covering his eyes with his hands in a gesture of frustration or despair. A white mug is on the desk in front of him. The background is dark, and the overall mood is one of stress or frustration.



## 20% of ERP Implementations Fail.

DON'T BE A STATISTIC.

[Download White Paper](#)

Avoid The Common Mistakes That Lead To ERP Failure With This Guide

[go.qad.com](https://go.qad.com)

 [Download](#)

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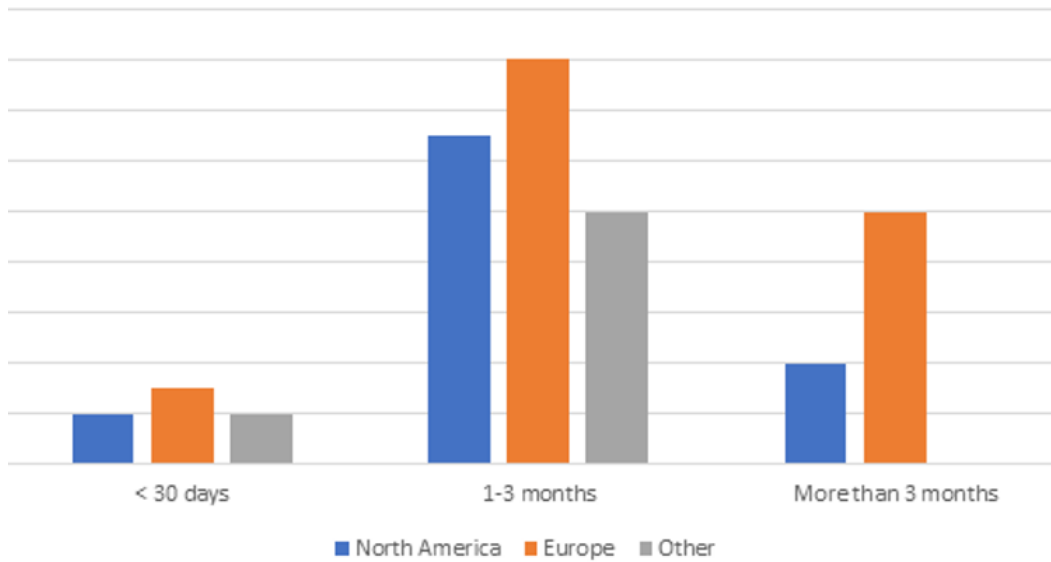
Accelerate Remote &  
Virtual Sales

Increase Customer  
Lifetime Value

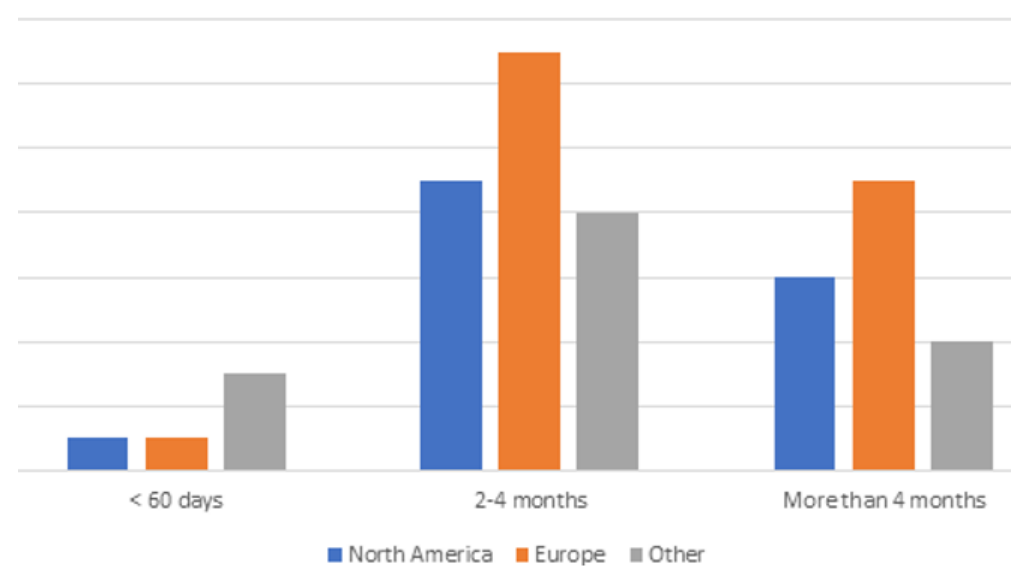
Driving Scale &  
Growth

Accelerate Remote &  
Virtual Sales

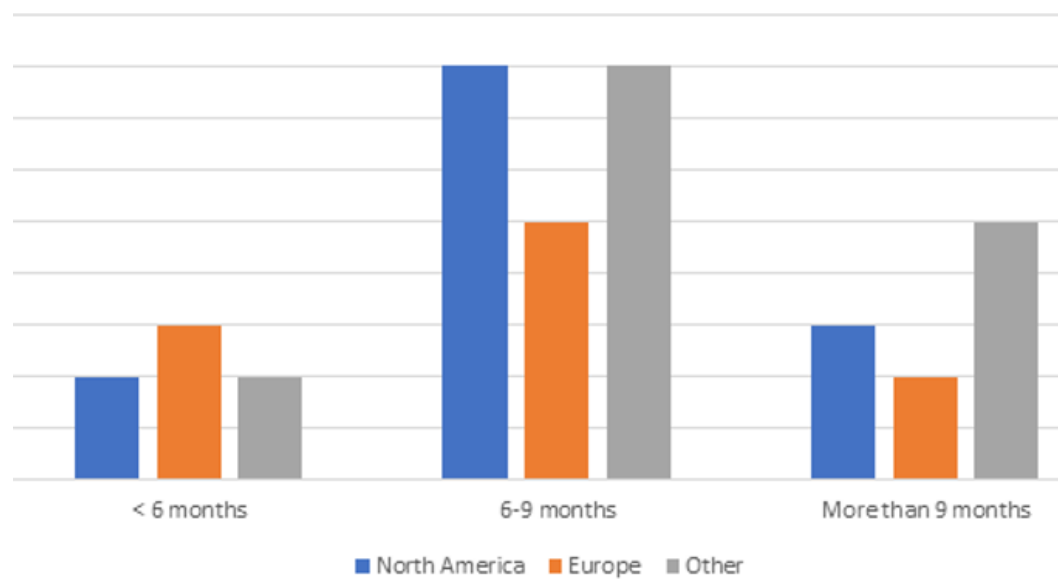
### SMB Sales Cycle



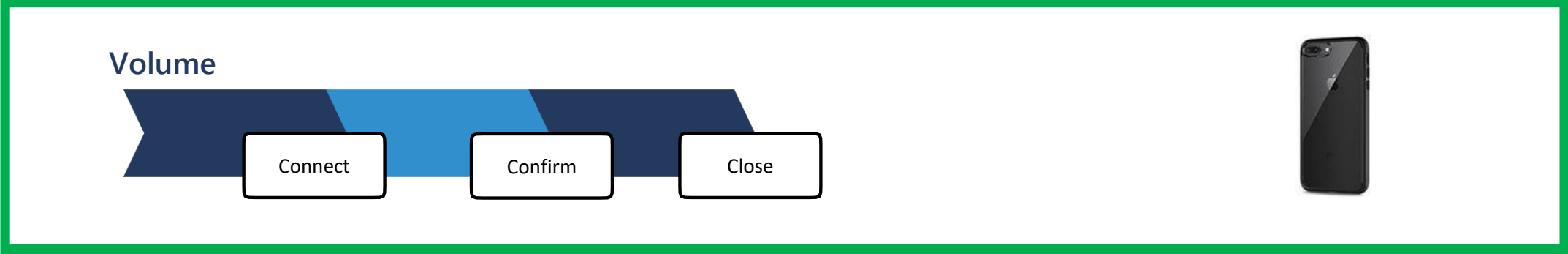
### Mid Market Sales Cycle



### Enterprise Sales Cycle



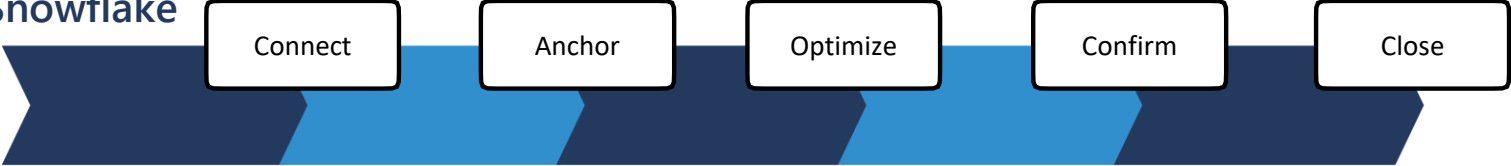
# Cloud Sales Motions



**Value**



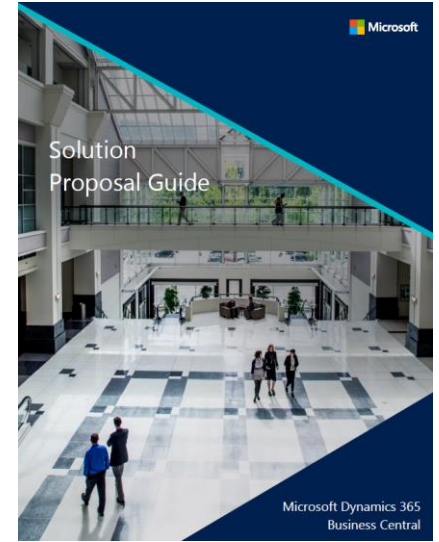
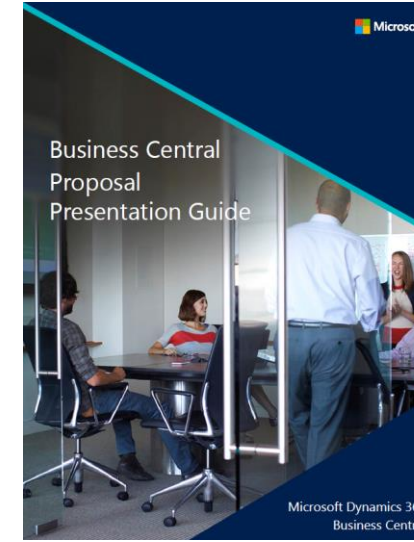
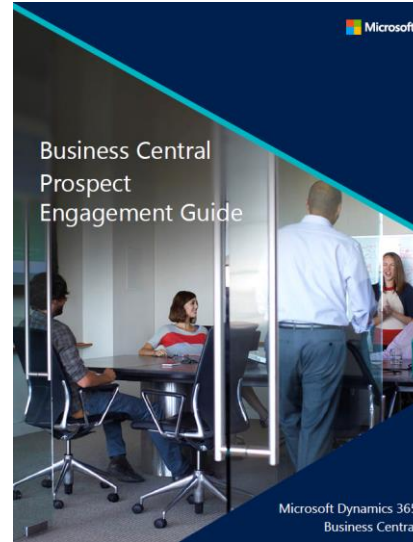
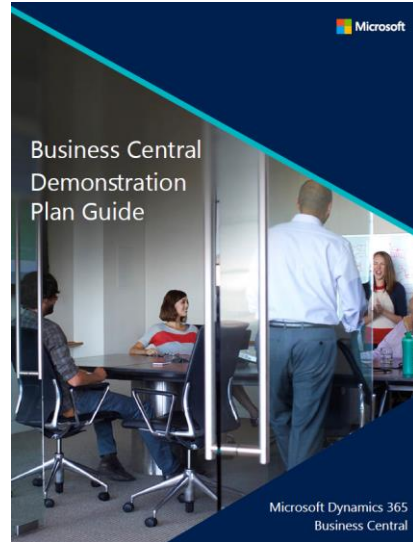
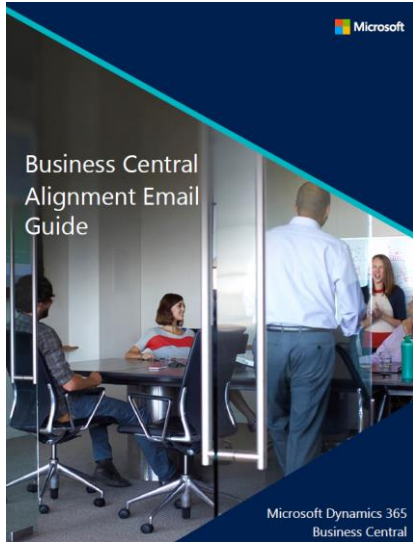
**Snowflake**





# Business Applications Partner Sales Acceleration Program (PSAP) (microsoft.com)

<https://partner.microsoft.com/en-us/training/assets/collection/business-applications-partner-sales-acceleration-program-psap#/>



Documentation

Engagement Comm.	Discovery Questions	Educational Insights
Differentiation Demonstration	Alignment Email/Video	Engagement Plan

Requirements Survey	Demonstration Plan
Project Summary	

Proposal Presentation	Solution Proposal
Contract (Digital)	

Connect: 14 Days

Confirm: 14 Days

Close: 7 Days

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Lifetime Value

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Growth

# Partner to Partner

1. Better understand the P2P model
2. Find the suitable Financial Model
3. Get in touch with Indirect Providers

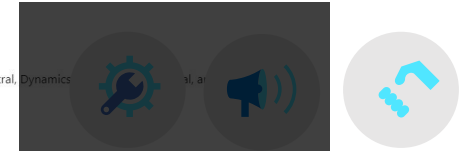
[Aka.ms/SMBP2P](https://aka.ms/SMBP2P)

## Business Applications SMB P2P resources COLLECTION

Last Modified 2020-07-16












Leverage other partners to deliver end-to-end Business Central, Dynamics 365, and Power Apps solutions for your SMB customers.

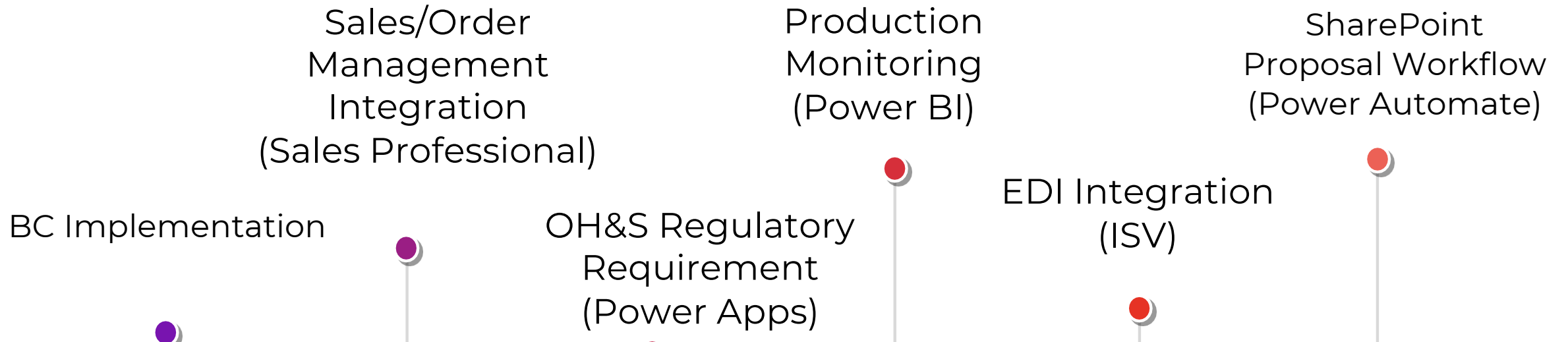


### This campaign's content

Showing 1-9 of 9 assets

 539.1 KB P2P overview: Sell Dynamics 365 without becoming an expert Launch a new business quickly by working with an experienced partner. 2020-08-17	 341.8 KB The Partner-to-Partner Opportunity An overview of the P2P value chain. 2020-07-16	 69.9 KB P2P Financial Model (MW Partner Lead Referral Revenue Share) Identify the financial impact of ongoing revenue share. 2020-07-16	 56.9 KB P2P Financial Model (MW Partner Lead Referral Incentives) Identify the financial impact of lead incentives. 2020-07-16
 113.8 KB P2P Financial Model (MW BC Build) Identify the financial impact of building a Dynamics practice. 2020-07-16	 128.8 KB P2P Financial Model (Dynamics Existing Provider) Identify the financial impact of implementing solutions from referrals. 2020-07-16	 07:37 Modern Workplace partner lead referral compensation models tutorial Learn how to complete the Lead Referral financial models. 2020-07-16	 05:54 Modern Workplace partner Dynamics practice build tutorial Learn to complete the financial model for building a Dynamics practice. 2020-07-16
 07:01 Existing Dynamics provider tutorial			

# Identify Your Customer Journey





# Post-deployment Nurture Programs

1. Customer onboarding
2. Education: lesson-based nurture
3. Product/service/news updates
4. Milestone nurture
5. Legacy customer nurture



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