



# Microsoft Dynamics xRM - a leap forward for business solutions

Microsoft Dynamics CRM is evolving.

The 'C' in CRM has been replaced with 'X' and the X can represent any element a business requires tracking

## What the experts are saying about xRM:

**"Some people buy CRM for the core sales, service and marketing, but some people say, "You know what? I also want to go ahead and build other things." Some of our partners have built project management and accounting on CRM. They use CRM for leads and opportunities and build project objects and consulting objects and work plans. ... You just create the entities and workflows, and off you go. So we are seeing a lot of that where people are using us as a flexible work platform." Brad Wilson – General Manager for Microsoft**

**"xRM is essentially Microsoft Dynamics CRM with the direct CRM taken out and functionality put in, so you can manage any resource or relationship you want to," said Chris Fletcher, analyst with Boston-based AMR Research.**

**xRM means that any object, process or person in an organisation can now be tracked, monitored and updated based on individual business processes using the power of Microsoft Dynamics CRM.**

Any organisation deploying an xRM application will see the following dramatic results:

- reduce the time to deploy
- decrease the cost of development
- lower the required training
- increase user satisfaction

So what makes Microsoft Dynamics CRM so customisable? Quite simply the underlying technology.

Microsoft originally designed the solution to be a toolbox to allow for rapid development and customisation while maintaining the core CRM functionality.

Goldcrest Solutions are experts in designing xRM solutions based on Microsoft Dynamics CRM, see overleaf how our customers are benefiting from some of the xRM solutions we have developed.



**GOLDCREST SOLUTIONS**

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**Goldcrest Solutions are at the forefront of delivering Microsoft solutions that really make a difference to businesses**

## Consultancy Relationship Management Challenge

The business in question is a large educational services reseller who wanted to better manage interactions with consultants. Typically consultants would send CVs into the company and then the company would review the CVs and assign appropriate consultants to a relevant project. The business had many CVs scattered around the organisation and it was difficult to search and find the most appropriate consultant for a project. Additionally, once a consultant was involved in a project there was no way to assess his/her performance.

## Solution

Goldcrest Solutions developed a consultant portal that would allow any interested individual to upload their CV and register their skills area, this information is then posted to CRM so that internal staff can search for the appropriately qualified consultant. CRM users could also search, not just based on qualifications, but also on location to find the consultant most conveniently placed to be involved in the project. Project details are also recorded in CRM and the consultants who worked on the project can be easily viewed and assessed.

## Payment Management Challenge

The Consultancy Business wanted to allow their staff to be able to access and update account information for customers via CRM. The specific functionality required included the ability to handle discounts on days purchased, partial invoicing, applying payments and partial payments to customer records and creating credit notes.

## Solution

Goldcrest Solutions developed the existing CRM system to provide a streamlined and user friendly way to handle all the basic accounts operations. Once these operations were processed within CRM the details are then automatically passed to the accounts system. All standard reports, such as the Aged Debtor report are now run from within CRM.

## Project Management Challenge

A large organisation wanted to combine a customer management solution with project management capabilities and had struggled to find the right solution. They specifically wanted to be able to upload Microsoft Project files into CRM and assign specific templated tasks to a given project. They were keen to be able to handle timesheets, resource allocation and have the same visual way of viewing a project as in Microsoft Project.

## Solution

Goldcrest Solutions developed the CRM system to handle complex projects and this included importing Microsoft Projects into CRM and then distributing activities to the appropriate resources, recording costs, resource planning, timesheet management, risks, issues, integration to a document management system (SharePoint) and the mapping of project tasks onto a Gantt chart. From a business intelligence perspective Goldcrest Solutions developed a series of dashboards to allow project managers to pinpoint at risk projects and respond accordingly.

Interested in what an xRM solution can deliver to your business? If so contact us on any of the methods below and we would be delighted to discuss how we can deliver the right solution for your business.



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