



# INSTANT CRM

## Sales, Marketing & Customer Service

### Instant CRM

The days of long implementations for CRM are over. You can now implement CRM in just a few days – giving your business access to important data to make key business decisions. Socius will help you implement Microsoft Dynamics CRM instantly! Users can be up and running with very little implementation setup and installations costs. Now is your chance to see what CRM can do for you.

### CRM Software Options

Choose between Microsoft Dynamics CRM Online Professional and Professional Plus. Depending on your needs, you can implement either version with all of the key functions of CRM. If you choose to use CRM offline, the Professional Plus is your choice here.

### Project Scope and Process

Socius uses a proven implementation model for CRM Projects. Experienced consultants will work with you to determine the best setup for your key business requirements. Socius will install and setup the CRM Outlook client for up to 5 users and teach you how to install and setup additional users on your own. Socius will migrate one data source into Accounts, Contacts and/or Leads. Users will be trained on the modules chosen and the Administrator will learn to manage the software including making changes to screens, views and workflows. Socius will be available to support your users for go-live, as they begin to capture valuable information.



#### Microsoft Dynamics CRM Professional

**\$44/User/Month**

- Sales Automation
- Marketing Automation
- Service Management
- Outlook Integration
- Report Services
- Dynamics Excel Link
- Microsoft Word Automation
- Office Communication Link
- System Customizations (100 Custom Entities)
- Workflow Automation (100 Custom Workflows)
- Web Services SDK
- 5 GB Storage

#### Microsoft Dynamics CRM Professional *Plus*

**\$59/User/Month**

- Sales Automation
- Marketing Automation
- Service Management
- Outlook Integration
- Report Services
- Dynamics Excel Link
- Microsoft Word Automation
- Office Communication Link
- System Customizations (200 Custom Entities)
- Workflow Automation (200 Custom Workflows)
- Web Services SDK
- Offline Synchronization
- Offline SDK
- 20 GB Storage

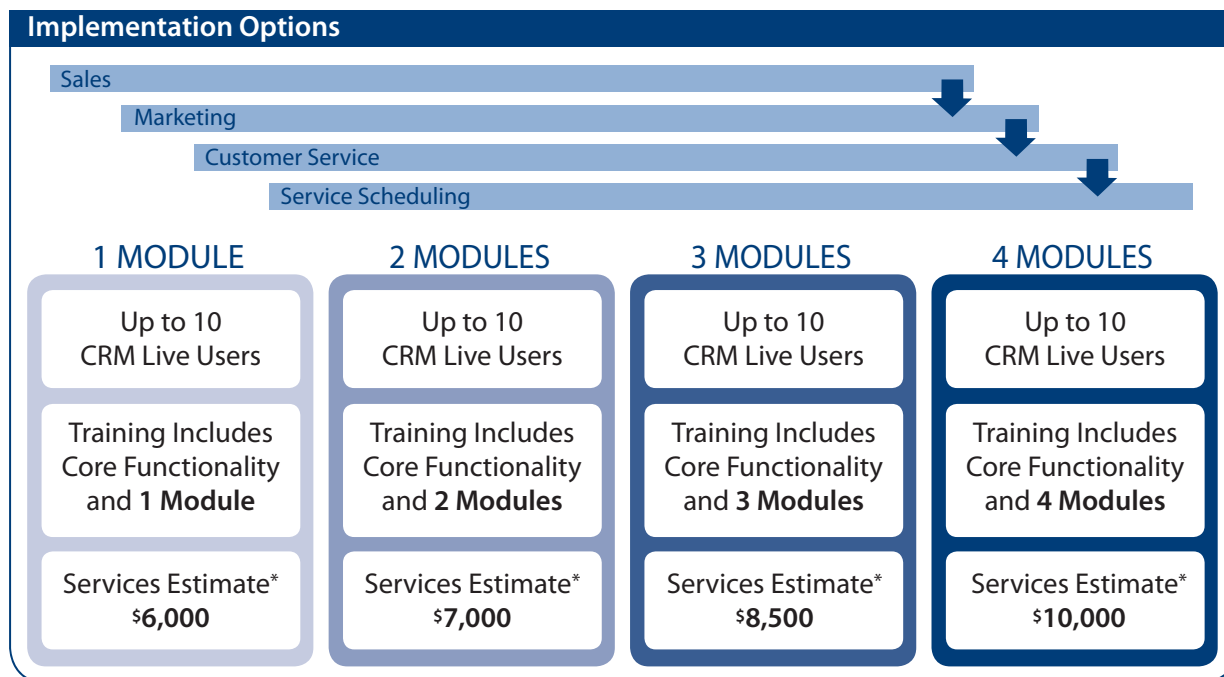
\*Microsoft requires a 5 user minimum and charges \$79 for the first month per user to include setup fees.

## Implementation Options

Choose which modules you would like to deploy. Microsoft Dynamics CRM Online comes with four modules:

- Sales
- Marketing
- Customer Service
- Service Scheduling

“Microsoft Dynamics CRM Online offered the functionality we were looking for and the familiar Outlook-style interface, for about *one-third the cost* of Salesforce.com. Socius was able to get us up and running — with all our existing data converted to the new system — within two weeks.” - *Clint Brown, president and CEO of Florence Freedom*



\*Services will change based on what modules your company chooses to deploy.

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### Plan

- Project Planning

### Build

- Installation of 5 Client Workstations
- User and Security Setup
- Data Migration Mapping (*One Source*)

### Deploy

- End User Training
- Administrative Training
- Go Live Support

### Transition

- Post Implementation

## Step 1: Subscribe to Microsoft Dynamics CRM Online

First, decide which edition best fits your needs. Select which edition of Microsoft Dynamics CRM Online:

- Microsoft Dynamics CRM Online **Professional**  
**\$44 per month per user\***
- Microsoft Dynamics CRM Online **Professional Plus**  
**\$59 per month per user \***

\*Microsoft requires a minimum of 5 users for CRM Online and charges \$79 per user for the first month, which includes initial setup fees. Sales tax not included.

Then, choose either option below to subscribe:

### 1. Assisted Sign-Up

Fill out this online form\*, and one of Microsoft’s team members will contact you with information on how to sign up.

\*Note: Please choose “Yes” and write in “Socius” in the field where you are asked if you are working with a Dynamics Partner.

### 2. Self-Service Sign-Up

Use a sign-up wizard to subscribe and get started at <http://crm.dynamics.com/buynow.aspx>

Choose either the “Professional” or “Professional Plus” links under the On Demand section.

	Microsoft Dynamics CRM Professional	Microsoft Dynamics CRM Professional PLUS
Sales Automation	●	●
Marketing Automation	●	●
Service Management	●	●
Outlook Integration	●	●
Report Services	●	●
Dynamics Excel Link	●	●
Microsoft Word Automation	●	●
Office Communication Link	●	●
System Customizations	100 Custom Entities	200 Custom Entities
Workflow Automation	100 Custom Workflows	200 Custom Workflows
Web Services SDK	●	●
Storage	5 GB	20 GB
Offline Synchronization		●
Offline SDK		●
<b>Cost per User per Month</b>	<b>\$44</b>	<b>\$59</b>

## Step 2: Select an Option for Socius Implementation Services

Please select one of the four options that best fits your needs.

Implementation Option	Description	Estimated Cost for Services
<b>1 MODULE</b> Select 1 Module: <input type="checkbox"/> Sales <input type="checkbox"/> Marketing <input type="checkbox"/> Customer Service <input type="checkbox"/> Service Scheduling	<ul style="list-style-type: none"> <li>• Up to 10 CRM Online Users</li> <li>• Setup and training includes core functionality and one module</li> <li>• Services provided are outlined under Project Scope and Process section</li> </ul>	\$6,000
<b>2 MODULES</b> Select 2 Modules: <input type="checkbox"/> Sales <input type="checkbox"/> Marketing <input type="checkbox"/> Customer Service <input type="checkbox"/> Service Scheduling	<ul style="list-style-type: none"> <li>• Up to 10 CRM Online Users</li> <li>• Setup and training includes core functionality and 2 modules</li> <li>• Services provided are outlined under Project Scope and Process section</li> </ul>	\$7,000
<b>3 MODULES</b> Select 3 Modules: <input type="checkbox"/> Sales <input type="checkbox"/> Marketing <input type="checkbox"/> Customer Service <input type="checkbox"/> Service Scheduling	<ul style="list-style-type: none"> <li>• Up to 10 CRM Online Users</li> <li>• Setup and training includes core functionality and 3 modules</li> <li>• Services provided are outlined under Project Scope and Process section</li> </ul>	\$8,500
<b>4 MODULES</b> 4 Modules Included: Sales Marketing Customer Service Service Scheduling	<ul style="list-style-type: none"> <li>• Up to 10 CRM Online Users</li> <li>• Setup and training includes core functionality and 4 modules</li> <li>• Services provided are outlined under Project Scope and Process section</li> </ul>	\$10,000

