

MICROSOFT DYNAMICS 365 CRM PROSPECTING TOOL



Questions? Contact
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OVERVIEW

In response to FEI Chapter requests for a database that can facilitate member prospecting, Microsoft Dynamics 365 was determined to be the best platform for FEI. The CRM system will be able to track membership prospecting efforts as well as track Chapter sponsorship processes.

Both versions allow FEI staff to assign prospects to Chapters to help feed their prospective member pipeline, and all users to create/update organization, individual and "sales" opportunity records for both prospective members and sponsors.

OPTIONS

There will be two CRM system options – Portal Access and Full Access (Sales) which will provide Chapters different levels of access depending on the best solution for a Chapter's prospecting needs. Pricing differs for each level.

	PORTAL \$250*	FULL \$500*
Create/Update Single Records <i>Individuals, Organizations, and Opportunities.</i>	YES	YES
Email Functionality and Activity Tracking <i>Feature enables full activity tracking and ability to email from Dynamics 365 + Office 365 license.</i>	NO	YES
Insights <i>View additional info from LinkedIn and other online sources directly within CRM.</i>	NO	YES
Reports <i>Both prospects created by the Chapter and prospects within the Chapter's 75 mile epicenter.</i>	NO	YES
Document Management	NO	YES
Mobile Version	YES	YES
Record Notes	YES	YES
Import Data	NO	YES
Opportunities Visible to Chapter Teams	NO	YES

Each Chapter user requires a license (if serving multiple Chapters, multiple licenses must be purchased). All users within the same Chapter will be added to the Chapter Team.

All Chapter users will be able to view, edit and market FEI to individuals for both memberships and Chapter sponsorships.

**Annual per-user license fee*