

# DYNAMICS 365 UPGRADE WORKSHOP FOR FINANCIAL SERVICES (FREE 3 HOUR SESSION)

An on-site **upgrade workshop**, to help identify the next stages of your CRM and digital maturity journey and map out next step actions for upgrade and migration to cloud hosted D365

## ABOUT THE WORKSHOP

We'll help you identify, shape and steer your future commercial goals and objectives and gain a sound understanding of project timings and processes, helping you achieve Board and Stakeholder buy in from the outset.

## THE DETAILS

Understand the benefits of D365 upgrade and how the tools and integrations can drive your business forward. Uncover new features, a slick user interface and integrated web portals, and learn how D365 future-proofs your systems. Understand the upgrade benefits for operations, engagement, sales and marketing, risk and 3rd party management, all whilst overcoming out of support challenges.

Leave with actionable next steps on how to maximise your system's potential, by upgrading from on-prem (V4, 2011, 2013, 2015, 2016, V8, V9 Dynamics CRM) to D365 Online.

## WHO ARE THESE WORKSHOPS FOR?

Redspire and Microsoft are working together to help Enterprise and SMC Financial Services businesses achieve more. These sessions have been developed for Executive teams who are coming to end of support, working with unfit for purpose legacy packages, and looking to make their Dynamics systems work harder and smarter. Clients are likely to be:

- FS businesses with over 200 employees
- A large department within a large FS business

## DELIVERY AND OUTPUTS

This three hour session is facilitated by three of Redspire's senior Financial Services team. Post-session, you'll feel confident about how to progress your project, with actionable next step summary documents to share with Stakeholders. No next stage commitment required.

## KEY WORKSHOP OUTCOMES

### UNDERSTAND THE NEW TOOLS

Understand how upgrading to Dynamics 365 can improve efficiency and how the new tools can enhance what you already know.

### SET OBJECTIVES & MILESTONES

Align cross departmental upgrade priorities and gain clarity on objectives, milestones and costs from the outset.

### ACTIONABLE LEAVE-BEHIND PLANS

Throughout the workshop, we'll create detailed leave-behind reports and plans that can set your upgrade plans in motion.

### COST EFFECTIVE PLANNING

Reduce costs from the outset by understanding and prioritising upgrade requirements with razor focus.

### MEET THE REDSPIRE TEAM

Meet the team and build a strong, productive relationship from that very first meeting, should you proceed.

# WHY REDSPIRE?

## MICROSOFT GOLD PARTNER CONSULTANCY

Work with one of the UK's leading and fully accredited Microsoft Gold Partner consultancies.

## THE MICROSOFT RELATIONSHIP

Enjoy a close relationship with Microsoft's Account Management team, complemented by Redspire's hands-on consultancy.

## SCOPE MARKET LEADING TECHNOLOGY

Dynamics for Financial Services is more than a CRM, it's a connected suite of enterprise applications that delivers your whole business, in one unified system.

## NO OBLIGATION TO PROCEED

Build and scope truly customised upgrade technology requirements to your exact business needs, with no obligation to proceed.

## BOOK YOUR UPGRADE WORKSHOP



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## WHY REDSPIRE?

Redspire is a Microsoft Gold Partner who help UK Banking & FS organisation effectively manage data, improve operations, and control security, compliance & risk; all whilst delivering safe and secure client experiences.

From foundational level projects to achieving iterative digital maturity, we have a proven track record delivering data-led organisational change with market leading FSI organisations like RPMI, Clydesdale and Yorkshire Banking Group, Money Advice Service & Saffron Insurance.

