

InfoPad

Dynamics 365 CRM Offboarding

Summary of Service:

- ▶ InfoPad's Dynamics 365 CRM Offboarding ensures a smooth transition with comprehensive data migration, system decommissioning, and compliance adherence, safeguarding your data integrity and operational continuity.

Service features and benefits:

Service features

- ▶ Secure data extraction.
- ▶ Complete data backups.
- ▶ Compliance checks.
- ▶ System decommissioning.
- ▶ Account closure management.
- ▶ Data portability solutions.
- ▶ Custom data retention.
- ▶ Detailed offboarding reports.
- ▶ Stakeholder communication.
- ▶ Post-offboarding support.

Service benefits

- ▶ Protects business data.
- ▶ Ensures compliance with regulations.
- ▶ Minimises operational disruptions.
- ▶ Facilitates data transfer.
- ▶ Manages account closures efficiently.
- ▶ Preserves important information.
- ▶ Provides clear documentation.
- ▶ Enhances stakeholder trust.
- ▶ Supports future transitions.
- ▶ Reduces offboarding risks.

Why Choose Infopad?

- ▶ InfoPad boasts over 50 years of combined technical expertise in Microsoft Dynamics, underscoring our deep-rooted knowledge and proficiency in CRM solutions. This extensive experience equips us to handle complex challenges and tailor Dynamics 365 to seamlessly integrate with various business processes and systems.
- ▶ Additionally, our status as a partner with leading technology providers like Microsoft, HubSpot, and ClickDimensions enhances our capability to offer comprehensive and advanced solutions. These partnerships not only validate our expertise but also provide us with early access to new features, tools, and support, which we leverage to benefit our clients.
- ▶ Our certified expertise and strong partnerships ensure that we are equipped to provide cutting-edge solutions, keeping our clients ahead in a rapidly evolving digital landscape. This combination of technical mastery and elite partnerships makes InfoPad a particularly wise choice for organisations looking to maximise their CRM investments and drive significant business growth.

Partnership Approach

► Commitment to Collaboration:

Working with InfoPad in a partnership approach offers a distinctly advantageous alternative to engaging with larger organisations. This benefit stems from our commitment to collaboration and customisation, tailored specifically to meet the unique needs of each client.

► Personalised Attention and Flexibility:

Unlike larger corporations where clients may feel like just another number, InfoPad prides itself on offering personalised attention to every client. We understand that each business has its unique challenges and opportunities, and our approach is to tailor our services and solutions accordingly. This flexibility ensures that our solutions not only meet the current requirements of our clients but are also adaptable to evolving business conditions.

► Rapid Response and Implementation:

Our streamlined decision-making processes allow us to respond more quickly to client requests and market changes. Larger organisations often face bureaucratic delays that can slow down project momentum. At InfoPad, we leverage our agile structure to initiate projects more swiftly and adapt timelines, ensuring that implementation is both efficient and effective.

Partnership Approach

► Transparency and Trust:

We operate on principles of transparency and trust, which are central to building strong, lasting partnerships. Our clients have direct access to senior team members and decision-makers, fostering a deeper level of trust and collaboration. This openness extends to our pricing and project management, ensuring there are no hidden fees or surprises.

► Dedicated Support and Empowerment:

InfoPad not only aims to deliver solutions but also to empower clients through the transference of skills and knowledge. Our partnership approach includes comprehensive training and support, designed to enhance client capabilities and independence. This commitment to client empowerment stands in contrast to the often transactional relationships fostered by larger entities.

► Cost-Effective Solutions:

Our solutions are designed to provide the best value for our clients' investments. We focus on delivering cost-effective services that do not compromise on quality or effectiveness. This approach is particularly beneficial for organisations that need high-quality solutions but must adhere to stringent budget constraints.

The Institute of Chartered Accountants

Testimonial

"I must commend Infopad for the support and remarkable professionalism throughout a challenging and lengthy transition of Microsoft Dynamics. The transition to Microsoft Dynamics was a significant undertaking for our organisation and we had high expectations for the support we would receive. Infopad not only met but exceeded these expectations at every turn. They not only possessed an in-depth knowledge of Microsoft Dynamics but they tailored their approach to our specific needs by gaining an insight to our internal teams and building relationships.

The dedication, expertise and professionalism made this challenging process considerably more manageable and we are now reaping the benefits of our upgraded system."

Julie Goodway - IT Service Delivery Manager, ICAEW

JEWISH CARE

Jewish Care Health & Social Care

Testimonial

"We have worked with InfoPad for over four years and they feel very much part of the team. Whilst change is always difficult, the benefits to our organisation from the Dynamics system they have helped us to deliver are enormous. They have worked in an open way to help us make the best of all new features Dynamics 365 has to offer, and helped us reduce the overall costs of implementing the system by empowering our internal resources."

Ross Mullenger, Head of IT, Jewish Care

University College of Estate Management

Testimonial

"The Dynamics CRM system is vital in supporting our sales and marketing activity with businesses; I cannot imagine building the relationships we have and achieving the increases in revenue that we have seen without this CRM. With InfoPad, you get to speak directly to the consultants and developers who build your system and provide the training. Their technical expertise is clear; they are a pleasure to work with."

Meryl Bonser, Director of Enterprise Business Development, UCEM

InfoPad's Cloud Support Services

► InfoPad – Click Dimensions Setup, Migration, Training, and Support:

At InfoPad, we offer a comprehensive Click Dimensions service that includes initial setup, smooth migration, bespoke training, and ongoing support. Our expert team ensures a seamless integration with Microsoft Dynamics 365, enhancing your marketing efforts through automation, email campaigns, and performance analytics. With our support, you can leverage Click Dimensions to create impactful customer engagements tailored to your business needs.

► InfoPad – Customer Insights Setup, Migration, Training, and Support:

InfoPad's Customer Insights service is designed to transform your data into actionable insights. Our setup and migration process integrates seamlessly with your existing systems, supported by targeted training and continuous support to maximise usability. We empower your team to leverage Customer Insights to enhance understanding of customer behaviours and preferences, thereby driving personalised marketing strategies and improving customer relationships.

► InfoPad – Dot Digital Setup, Migration, Training, and Support:

Our Dot Digital services at InfoPad include comprehensive setup, efficient migration, customised training, and reliable support. We specialise in integrating Dot Digital with your Microsoft Dynamics 365 platform to optimise your email marketing, ecommerce campaigns, and customer journey tracking. Our approach ensures that you are fully equipped to harness the full potential of Dot Digital, enhancing your digital marketing impact while fostering deeper customer connections.

InfoPad's Cloud Support Services

► InfoPad – Microsoft Dynamics 365 Migration:

InfoPad provides expert migration services for Microsoft Dynamics 365, ensuring a seamless transition of your data and processes without disrupting your operational continuity. Our approach includes a thorough assessment of your existing systems, meticulous planning, and strategic execution to align with your business requirements. With InfoPad, you can confidently migrate to Dynamics 365, knowing that your data integrity and system functionality are preserved.

► InfoPad – Microsoft Dynamics 365 Setup:

At InfoPad, we specialise in the custom setup of Microsoft Dynamics 365, tailored to meet the unique needs of your business. Our team configures your CRM to enhance efficiency, improve customer relationships, and streamline sales and marketing processes. We ensure that Dynamics 365 integrates flawlessly with your other business applications, providing a robust foundation for your digital transformation journey.

► InfoPad – Microsoft Dynamics 365 Support and Maintenance:

InfoPad offers comprehensive support and maintenance services for Microsoft Dynamics 365, ensuring your CRM system operates at peak performance. Our dedicated support team provides timely solutions to technical issues, routine maintenance, and system updates to enhance functionality and security. With InfoPad's support, you can maximise your investment in Dynamics 365, ensuring it continuously evolves with your business needs.

► InfoPad – Microsoft Dynamics 365 Training:

InfoPad delivers customised training programmes for Microsoft Dynamics 365, designed to empower your team with the knowledge and skills necessary to fully leverage your CRM investment. Our training covers all aspects of Dynamics 365, from basic navigation to advanced features, ensuring users are proficient and can optimise their workflow. With InfoPad's training, your team will be well-equipped to enhance customer engagement and drive business growth.

InfoPad's Cloud Software Services

► Infopad - Dynamics 365 CRM for Charities and Non-Profits:

InfoPad's Dynamics 365 CRM for Charities and Non-Profits is designed to enhance the efficiency and effectiveness of non-profit organisations. This CRM solution supports the unique needs of the sector, such as donor management, fundraising campaigns, volunteer coordination, and event planning, ensuring that these organisations can focus more on their mission.

► Infopad - Dynamics 365 CRM for Higher Education:

InfoPad's Dynamics 365 CRM for Higher Education is tailored specifically for universities and colleges to manage student interactions and institutional operations efficiently. This solution integrates seamlessly into existing systems, offering tools for recruitment, student services, and alumni engagement, ensuring a unified approach to managing educational and administrative tasks.

► Infopad - Dynamics 365 CRM Healthcheck and Performance Audit:

InfoPad's Dynamics 365 CRM Healthcheck and Performance Audit provides a comprehensive evaluation of your CRM system to identify inefficiencies, potential risks, and improvement opportunities. Our experts thoroughly assess configurations, workflows, and data usage to ensure your CRM operates optimally, enhancing overall performance and user adoption.

► Infopad - Marketing Quickstarter Dynamics 365 CRM

InfoPad's Marketing Quickstarter for Dynamics 365 CRM equips your team with essential marketing tools to enhance campaign management and engagement strategies. Designed for rapid implementation, this service enables marketers to launch, manage, and analyse campaigns quickly and effectively, driving better ROI and customer engagement right from the start.

InfoPad's Cloud Software Services

► Infopad - Sales Quickstarter for Dynamics 365 CRM:

InfoPad's Dynamics 365 CRM for SMEs is a cloud-based solution designed to streamline customer relationship management. It offers comprehensive tools for sales, marketing, and service operations, tailored to the unique needs and growth demands of small to medium-sized enterprises, enhancing efficiency and customer engagement.

Infopad - Dynamics 365 CRM for Higher Education:

InfoPad's Dynamics 365 CRM for Higher Education is tailored specifically for universities and colleges to manage student interactions and institutional operations efficiently. This solution integrates seamlessly into existing systems, offering tools for recruitment, student services, and alumni engagement, ensuring a unified approach to managing educational and administrative tasks.

► Infopad - Customer Service Quickstarter Dynamics 365 CRM:

InfoPad's Customer Service Quickstarter for Dynamics 365 CRM accelerates your customer service setup, optimising efficiency and enhancing customer interactions. This service rapidly deploys core customer service functionalities, providing a robust foundation that can scale with your business needs.

► Infopad - Dynamics 365 CRM for SMEs

InfoPad's Dynamics 365 CRM for SMEs is a cloud-based solution designed to streamline customer relationship management. It offers comprehensive tools for sales, marketing, and service operations, tailored to the unique needs and growth demands of small to medium-sized enterprises, enhancing efficiency and customer engagement.