



# CRM Lite

Built with Xperience

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**Lite on design.  
Big on function.**





# What is CRM Lite?



Introducing or moving to a new CRM system doesn't have to be daunting, involve a complex implementation plan, or be highly expensive. Compared to your typical CRM system, our CRM Lite solution is lite on price, big on functionality, and you can go live in as little as 5 days.

CRM Lite allows your business to quickly and easily put your customer at the centre of your business. Developed, using Microsoft Dynamics and the power platform as its foundation, it provides you with all the functionality your business needs right now and the confidence that as your business needs grow and evolve, it can grow with you!

An out-of-the box solution, built and tested using our experience and expertise, CRM Lite guarantees success from the start. You can be ready to go in a matter of days on a scalable system that will help take your business to the next level!



# Why do I need CRM Lite?

## 1. Reduce your duplicated efforts and workloads

CRM Lite allows you to manage your workloads, reduce duplicated efforts and organise your customer data efficiently.

## 2. Collaborate better

Eliminate working in silos and work collaboratively, through different teams including sales, marketing, and finance.

## 3. Better managed data and processes

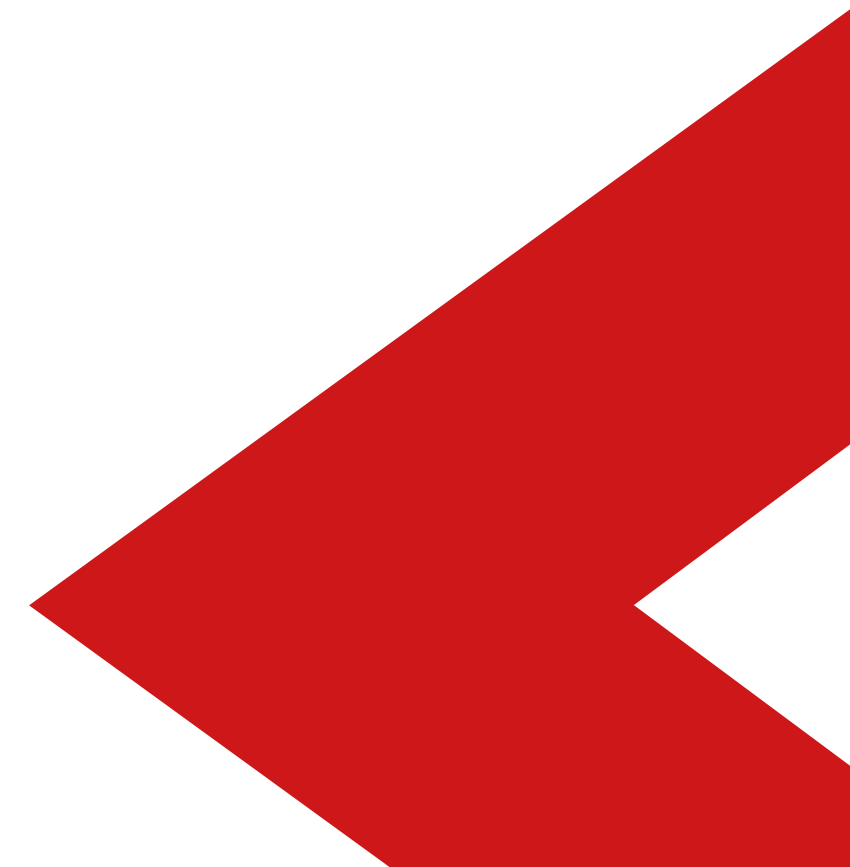
CRM Lite gives you the ability to manage your accounts, contacts, and sales which are stored in a central location in CRM Lite. Just like any other CRM system.

## 4. Cloud Hosted

CRM Lite is hosted on the same cloud platform as Microsoft 365, maximising productivity, data security & integration touchpoints with everyday applications such as Outlook, Word, and Excel.

## 5. Improved reporting

CRM Lite allows you to work within 6 pre-built dashboards, allowing you to generate better reports, managing your leads, customer data, and important information.





# What is included in CRM Lite?



- Manage accounts, contacts & sales
- Manage your sales stages with analysis of progress through the sales cycle
- Analysis of open, won and lost sales
- Manage sales price lists & items
- Basic ticket management
- Standard Dashboard Reporting

When implementing a CRM system sometimes less is more. The most successful organisations and projects require a system that is both streamlined and simplistic.

CRM Lite is a ready to go solution that provides you with the essential elements required to kickstart your CRM journey and grow with you as your business needs change.





## CRM Lite

- 5 day Quickstart Implementation
- 6 Standard Report Dashboards
- Sales Process Management
- 5 Automated Workflows
- Outlook Integration
- Single Currency Price List

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## CRM Enterprise

- Bespoke Configuration and Set-Up
- Unlimited Custom Report Dashboards
- Tailored Sales Process Management
- Unlimited Workflows
- External System Integration
- Multi Currency Price List

Still unsure which solution best fits the needs of your business?

Speak to a member of our expert team today to find out which CRM solution will work best for your business.





# Cost It Up!

## Quick Start Implementation

Up and running and fully installed  
on our base program for

**£3,490**

## Monthly User Pricing

From as little as

**£25.50**

Per user per month

Fully supported!

Talk to us about a combination licensing  
option.

**Not sure if CRM Lite  
is the right choice  
for you?**

Speak to our expert team of  
CRM consultants and allow  
them to recommend the  
best CRM solution for you  
business needs.



# Our Xperience with CRM

## Why Choose us for CRM?

Our future proof solution is based on Microsoft's Dynamics 365 CRM software. With over 5 million users worldwide and an R&D spend of \$2 billion annually, clients who invest in our CRM solutions can depend on a product that will continue to develop and will be there for years to come. We have also invested heavily in our CRM experts, including accreditation's and training and development, allowing us to provide the best service to our clients.

## How we work with you

We work in partnership with our clients helping them every step of the way and use agile methodologies depending on the needs or requirements. We have a quick start programme for small businesses through to complete project programme management for medium to large organisations.

With Xperience, one size does not fit all. We make sure that we understand what your challenges, what you want to achieve from your implementation and we help you develop a plan specific to your requirements. We have a wealth of knowledge and we make sure to use that deep industry expertise, working hand in hand with you to drive and improve your processes, manage risks and deliver a solution that works for you.



# For More Information

We are ready and waiting to take you on your CRM Lite journey!  
To find out more and to speak to a dedicated CRM consultant, please get in touch via  
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