

Case Study

Focus Finance

Dynamics 365 Sales
Instant Start 365 Implementation



Company and Project Introduction

With over 25 years of experience, Focus Finance is a trusted business finance partner to all types and sizes of organisations. As an independent family business, Focus Finance prides themselves on providing a personal service and bespoke solutions to their clients.

The company provide solutions for a diverse range of business finance challenges, whether that is financing equipment for a start up venture, structuring a multiple supplier finance solution for a million pound office move, or providing short term VAT funding.

Focus Finance were using an on-premise version of Dynamics CRM 2011 and therefore had previous experience with the platform, and was therefore familiar with administration & customisation. They approached Strategy 365 looking for assistance to simply provision a new Dynamics 365 Sales environment. Following initial communications, it was determined that Microsoft Dynamics 365 Sales Professional would be the best fit for their organisation.

Website: <https://www.focus.finance/>



3⁺ Staff
Company size



2 Users
Solution size

Solution Components

- Microsoft Dynamics 365 Sales
 - Instant Start 365 Package
 - Microsoft Licensing
 - Support Services

Project Summary

The project was to implement a Dynamics 365 Sales Instant Start 365 package. Strategy 365 offer quick start packages, a set of predefined options which allow businesses to implement Dynamics 365 at a fixed-cost in a matter of days or even hours. You can learn more about these quick start packages [here](#).

Focus Finance use Microsoft Dynamics 365 Sales to manage their accounts, contacts and enquiries. Outside of a few additional customisations, the system is close to an out of the box system. Following analysis from Strategy 365, it was determined that the business has a good understanding of how Dynamics 365 Sales can be implemented and customised, therefore reimplementing Microsoft Dynamics 365 Sales Professional via an Instant Start 365 package was the best option for the organisation.

Our Instant Start 365 package is suitable for smaller businesses with existing knowledge and skills of the Dynamics 365 platform, as it allows them to get up and running quickly for a low, fixed cost. An Instant Start 365 package will include the following basic set up features:

- Setup of a new Office 365 tenant if required
- Creation of a new Dynamics 365 environment
- Assignment of licences and security roles to users
- Configuration of core settings
- Guidance and introduction to Microsoft Dynamics 365

It was also agreed with Focus Finance that Strategy 365 would work in a guidance & advisory capacity after the reimplementation of Dynamics 365 Sales, therefore support services were also purchased which allows Focus Finance to utilise Strategy 365's expertise and technical skills in a variety of ways. You can learn more about our support services [here](#).

Key Deliverables

- An upgraded Dynamics 365 solution
- Quick implementation
- Support services to assist Focus Finance long term

Benefits

Strategy 365 implementing a Dynamics 365 Instant Start 365 package has brought Focus Finance many benefits including:

- Implementation of Microsoft Dynamics 365 Sales Professional which was more suitable for the organisation
- Instant Start 365 package which offered a rapid implementation at a low fixed cost
- Strategy 365's support services which allow Focus Finance to use our expertise and skills in a variety of ways

"With Strategy 365, they're not trying to pull the wool over your eyes. They listen and they're up-front and honest - that's what makes them streets ahead of the competition."

Gina Christopher, Managing Director, Focus Finance