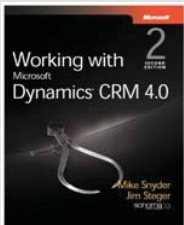




# Microsoft Dynamics CRM Experts

### We wrote the book ...

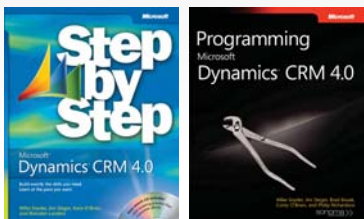
Microsoft Press recruited Sonoma Partners to write the official Microsoft Dynamics CRM book, "Working with Microsoft Dynamics CRM" for both the 3.0 and 4.0 versions.



The book contains insight on customizing forms, configuring security roles, tracking e-mail

and writing reports. It is written for those who implement and administer Microsoft Dynamics CRM.

Microsoft has commissioned two more books to be published in 2008, including "Step by Step - Microsoft Dynamics CRM 4.0." Step by Step is an end-user guide to daily tasks and taking full advantage of Microsoft Dynamics CRM functionality. "Programming Microsoft Dynamics CRM 4.0" will be a guide to working with the Software Developer Kit.



**Sonoma Partners is recognized worldwide** as the premier Microsoft Dynamics CRM consulting firm. We help enterprise and mid-market companies deploy and implement Microsoft Dynamics CRM, an easy-to-use, flexible and integrated solution that allows companies to increase sales, marketing, and customer service successes.

When choosing a Microsoft Dynamics CRM integration partner, Sonoma Partners is the preferred choice among companies that want a low-risk implementation driven by a team with proven experience. By using our expertise and an accelerated deployment model, we deliver projects that guarantee results.

We differentiate ourselves from other Microsoft partners because:

**We are 100% specialized in Microsoft Dynamics CRM** software and the Microsoft technology platform. Sonoma Partners is a Microsoft Gold Certified Partner that has worked exclusively with Microsoft Dynamics CRM since the version 1.0 pre-release beta software. We do not spread our resources across other services such as networking infrastructure.

**We have successfully implemented** more than 100 complex Microsoft Dynamics CRM customizations, and Microsoft has awarded us twice with the Global Microsoft CRM Partner of the Year Award for our proven track record and customer successes.

**We are a thought leader for Microsoft CRM.** Sonoma Partners has access to and participates in beta testing and evaluation for upcoming releases of Microsoft Dynamics CRM. The Microsoft product development team often solicits our feedback when refining the platform and increasing functionality.

**We have specific industry expertise.** We have created tailored solutions for many different industries, including:

- » Financial services
- » Professional services
- » Healthcare
- » Real estate
- » Franchised organizations

**We use our unique and proprietary project management tools** to eliminate confusion, save time and provide our customers with a great experience. Instead of creating lengthy requirement documents that no one reads, our proprietary tools accomplish the same goals in a quick and easy-to-use manner.



Partner

Contact us today to learn more about Sonoma Partners



Sonoma Partners, LLC 525 West Monroe Street Suite 240 Chicago, IL 60661  
(312) 627-0700 phone (312) 627-1305 fax sonomapartners.com Microsoft Dynamics CRM Experts

Microsoft Dynamics CRM 4.0 is a fully integrated CRM system that gives you the ability to easily create and maintain a clear view of customers from first contact and throughout the lifecycle of their account. With Microsoft Office Outlook integration and tools to enhance your company's sales, marketing, and customer service processes, Microsoft Dynamics CRM delivers a fast, flexible, and affordable solution to drive consistent and measurable improvement in everyday business processes.

### Marketing

Make more informed marketing investments with a clearer view of customers.

- » Customer segmentation
- » Campaign planning and execution
- » Data extraction and cleansing
- » Analytics and reporting
- » Sales and marketing collaboration tools

### Sales

Get more leads and close more business

- » Lead and opportunity management
- » Account and contact management
- » Territory management
- » Forecasting and sales analytics
- » Offline and mobile device access
- » Quick access to products, pricing, and quotes

### Customer Service

Provide more value to customers

- » Case and interaction management
- » Product and contract management
- » Knowledge-base management
- » Workflow across teams and groups
- » Service reporting and analytics

## A CRM solution for Professional Services organizations

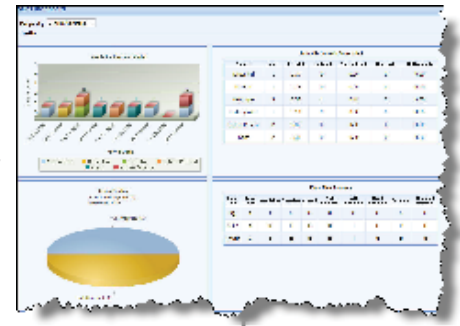
Sonoma Partners understands that companies that provide professional services instead of products run a bit differently. Your organization has one driving mission: to provide an unsurpassed level of counsel and specialized knowledge to your clients. Your CRM solution must help you consistently deliver those high-quality services, streamline practice management processes, and acquire and retain the best clients. Sonoma Partners and Microsoft Dynamics CRM can help you meet these goals.

Our professional services solution is designed to work within Microsoft Dynamics CRM while providing additional tools to manage more of your business, including resources, projects, client support, and employee development.

### Resource management

Since people are your product, managing your resources well is critical to your company's success. During the sales process, you must plan ahead to make sure right resources are available if the sale is won. This takes proper forecasting and reporting. Sonoma Partners can help you:

- » Understand which deals are closing within a specified timeframe
- » Forecast appropriate resources to make sure you have the right staff with the right skills available when you need them
- » Understand whether projects are over or under-planned



### Ongoing issue resolution

Your team needs to be able to find answers for your clients quickly. This is not always easy with a long-running or past project. Sonoma Partners solution for professional services companies helps organizations resolve post-project client issues by creating a complete archive of project information, so you can still retrieve information when you need it. There are also tools to automate business processes to ensure all client requests are dealt with in a timely and consistent manner.

### Collaborative project workspaces

Project management applications such as Microsoft Project are great, but they do not fully capture all the elements involved in managing a complete project. Our solution brings all components involved in successful project management into one common workspace.

- » Create quick and easy status reports for your client
- » Easily see if the project is on time and budget
- » Quickly find all documents related to the project
- » Manage expenses for the project
- » Assign project related work and tasks to team members

