



agile CRM
ANALYTICS

 **agile**
ANALYTICS

Gold
Microsoft
Partner

 Microsoft

Agile CRM Analytics

Microsoft Dynamics 365

A turnkey reporting solution based on
Microsoft Power BI that integrates
with your Dynamics 365 data

Agile CRM Analytics

For Microsoft Dynamics 365



A turnkey reporting solution based on
Microsoft Power BI that integrates with
Dynamics 365 data



Microsoft
Dynamics 365



Microsoft
Power BI App



Analytical
Dashboards

About Us

Agile Analytics is a Microsoft Gold Partner in Data Analytics.

At Agile Analytics, we consult, design, and deliver tailored data analytics solutions to mid-to-large size organisations using state-of-the-art Microsoft cloud technology.

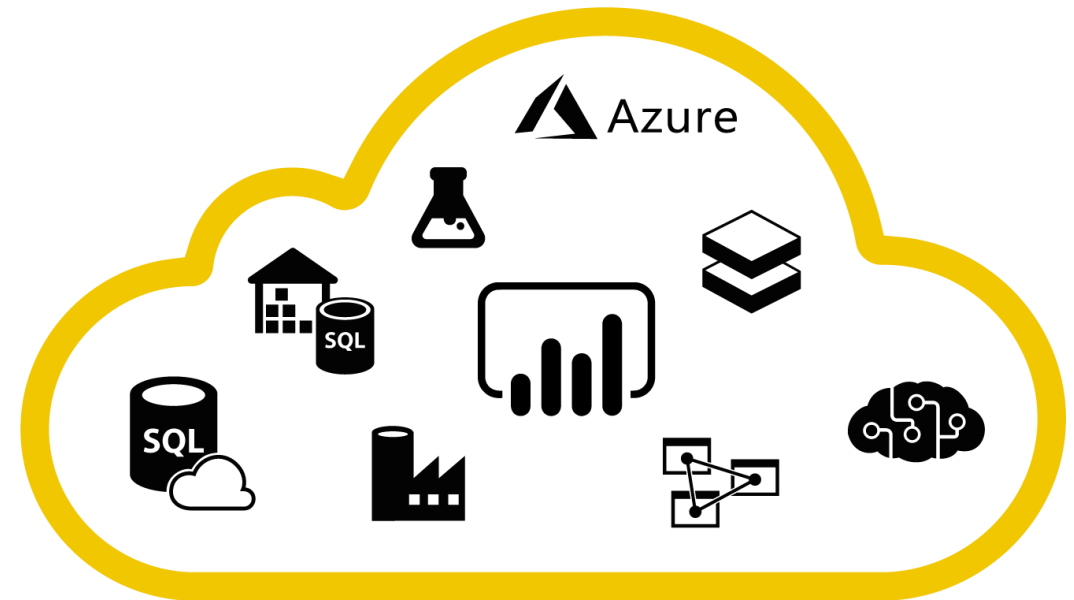
“

*Our mission is to help organisations build a **data-driven culture, to gain and sustain competitive advantage** in today's market.*

*We do this by **combining data analytics and machine learning, leveraging cutting-edge cloud technologies.***

Iman Eftekhari, Director

”



BUILDING END-TO-END DATA ANALYTICS
SOLUTIONS IN THE CLOUD

agile
ANALYTICS

Microsoft
Partner
 Microsoft

Gold Data Analytics
Gold Data Platform

What We Do

We deliver end-to-end Data & Analytics Solutions



Data Management

We design, build and maintain your organisation's data estate



Business Intelligence

We deliver business-focused solutions to enable data-driven decisions



Advanced Analytics

We help you transform your data into intelligent insights

Data Management

Modernise your data platform



**Data
Warehousing**



**Data
Ingestion**



**Transformation &
Orchestration**



**Data
Modelling**



**Data
Pipelines**



Data Lake



DataOps



**Data
Governance**

BI & Data Analytics

Convert your corporate data assets to actionable insights



**Management
Dashboards**



**Analytics as a
Service**



**Self-service
Analytics**



**Business
Insights**



**Enterprise
Reporting**



**Security &
Governance**



**Training &
Adoption**



**Maintain &
Support**

Machine Learning & AI

Taking Data Analytics to the Next Level



**Demand
Forecasting**



**Pricing
Optimisation**



**Risk
Management**



**Maintenance
Scheduling**



**Churn
Analysis**



**Natural Language
Processing**



**Customer
Segmentation**



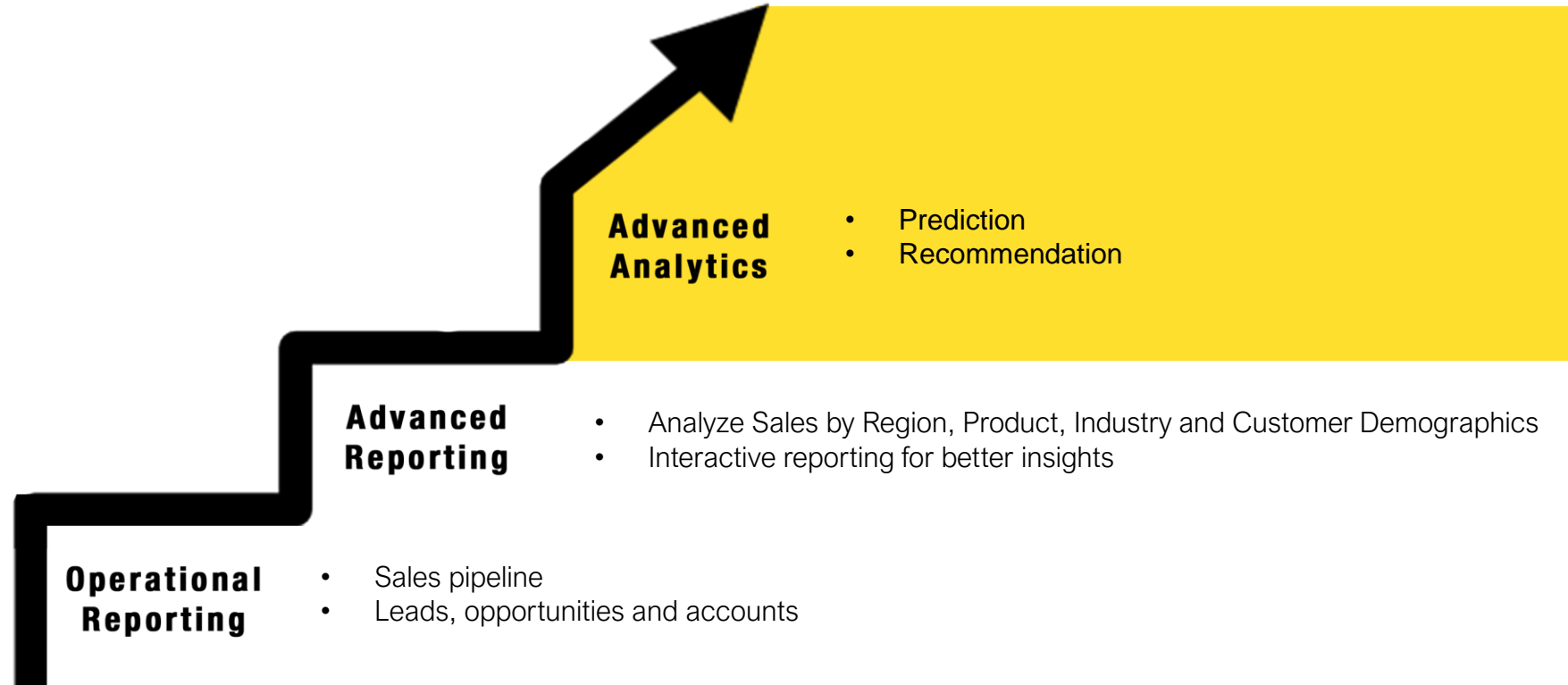
**Product
Recommendation**

Agile CRM Analytics

WHY, HOW, WHAT

Take Your CRM Data Further

From Operational Reporting to Advanced Analytics



Why Agile CRM Analytics?



No More Complexity!

Gaining insights from Dynamics 365 data is normally a long and complex process



Security

Securing the integrity and confidentiality of data is crucial



Visibility

Built-in reports lack a holistic view of the entire customer journey



Transparency

Managing customers without leveraging data is a difficult, tedious, and opaque process



Problems

Common **Challenges** with **D-365 reports**

- **Struggling** to find useful insights for strategic decision making.
- **Integration** with other systems is not easy.
- **Lack** of visibility of the **full customer's journey** in one place.
- **Difficulty** with reporting functionalities such as **grouping** or merging data groups.
- Managing and customizing dashboards often **needs IT support**.



Solution

Agile CRM Analytics

Your **CRM** data in **Microsoft Power BI**

- **Single reporting environment:** All your data in one place
- **Multiple data sources:** Data, from all sources, in one view
- **Fully cloud-based:** No need for new, on-premises software
- **Flexible security:** Customize what each user can see
- **Tailored to your organization's needs:** See sales processes and customized fields according to your requirements

Agile CRM Analytics for Dynamics 365

A fully developed CRM Analytics solution, to enable you make data-driven decisions



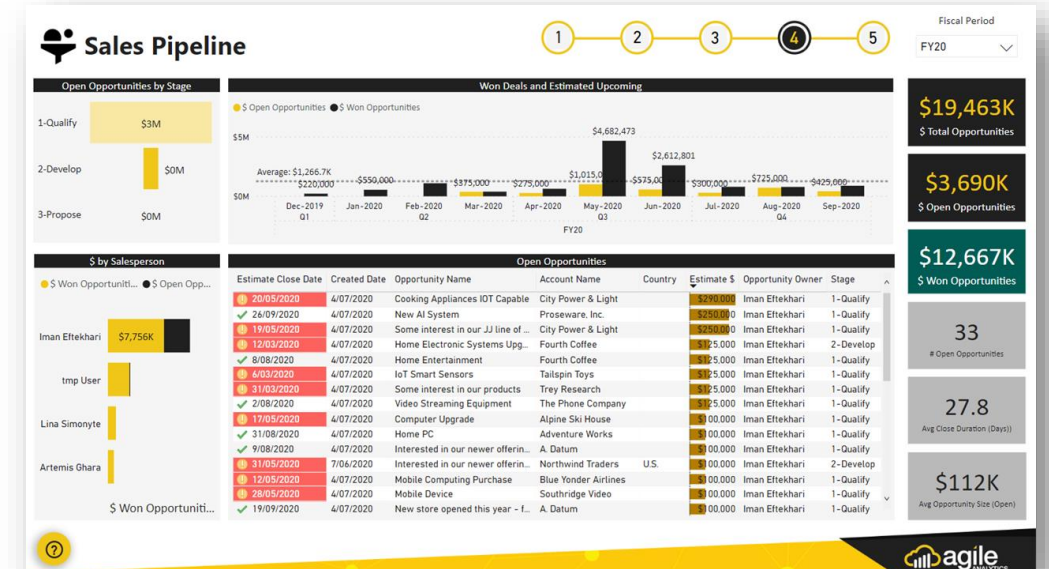
https://appsource.microsoft.com/en-us/product/power-bi/agile_analytics.dynamics365-power-bi-crm-reports

Microsoft Power BI: an Interactive Reporting Solution

Microsoft Power BI is a self-service business intelligence and reporting tool.

It's a drag-and-drop interface where you can pull in already existing as data from multiple sources into the visualization of your choice.

We make analyzing your CRM data easy. By connecting your Microsoft Dynamics 365 data with our fully developed CRM Analytics Solution, you can hit the ground running!



Make Data-Driven Decisions

Leads Analysis

Gain valuable insights on your marketing performance



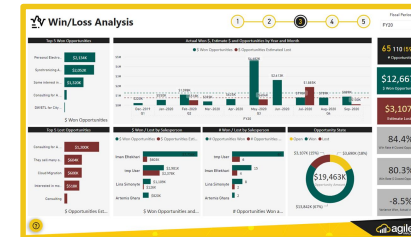
Sales Performance

Are your sales team members performing according to their targets?



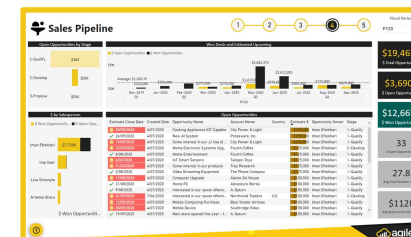
Win/Loss Analysis

Analyze the win rate, top wins and see it by sales reps and accounts.



Sales Pipeline

Gain valuable insights on your sales pipeline.





Business Value

Agile CRM Analytics

Simple and Effective

- **Minimal IT configuration:** quick and easy set up
- **Immediate value:** see your CRM data with few clicks
- **Fully cloud-based:** no need for new software or platform
- **Fast and easy to deploy and use:** one-click deployment, intuitive and easy to use
- **Subscription model:** simple and reasonable subscription plan
- **View all your CRM data** in one place, from any device, anywhere!

Integration with Dynamics 365

Agile CRM Analytics

Dynamics 365 Integration

- Dynamics 365 API
- One click installation



Microsoft
Dynamics 365



Microsoft
Power BI App



Analytical
Dashboards

Licensing

Agile CRM Analytics

Licensing Options

Self-service

Get the Power BI file and DIY

~~\$5000~~ **\$3,500**
One off

- ✓ Save 100's of hours in development time
- ✓ Get the PBIX file and take control of the rest
- ✓ Connect it easily to your Dynamics 365
- ✓ Customise the reports and create new ones
- ✓ Add your own logo and branding

Full Solution

We build & customise it for you

POPULAR

\$5,000
Starting price

- ✓ Full package including the existing reports
- ✓ Customised reports based on your needs
- ✓ Security set up and configuration
- ✓ API connection to your Dynamics 365
- ✓ Including your sales process and targets
- ✓ Your logo and branding

Contact us for a free quote

Power BI App

Pay as you go

\$250
Monthly

- ✓ All interactive reports
- ✓ API connection to your Dynamics 365
- ✓ No change to the existing reports
- ✓ Minimum 12 months



SEE YOUR CRM DATA IN ACTION!

Contact us for a demo / free consultation

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