Microsoft Dynamics 365 CE

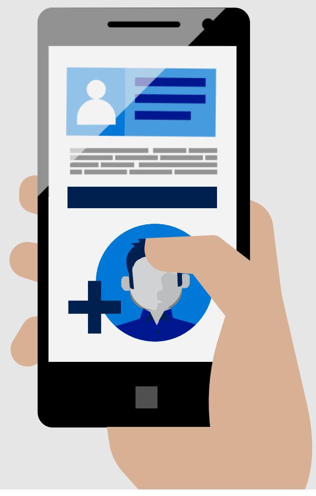
Day in the life - Financial services

Meet Joy, partner at VanArsdel, Ltd., a boutique financial services firm. She uses her Microsoft Dynamics 365 CE platform and tight integration with Microsoft Office to give her the flexibility she needs to manage her business on the go while protecting confidential client data.

6:15 AM

Score a new client

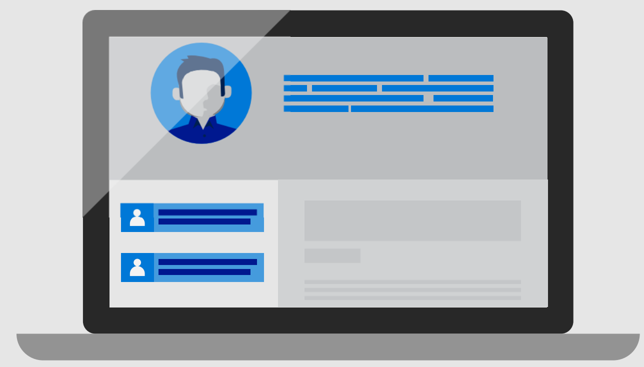
Checking email from her phone before getting out of bed, Joy sees that a client has referred someone to VanArsdel, Ltd.!



7:30 AM

Manage prospects

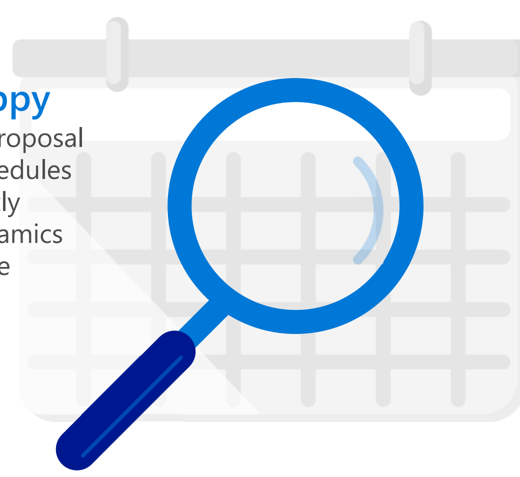
Fully caffeinated, Joy researches her new prospect using LinkedIn Sales Navigator and emails her notes to Cesar to add into Microsoft Dynamics 365 CE using the easy Microsoft Outlook add-on.



8:00 AM

Keep clients happy

With Cesar starting a proposal for the referral, Joy schedules a Teams meeting directly through Microsoft Dynamics 365 CE to meet with the prospect.



9:00 AM

Keep secrets safe

Prepping for a lunch meeting, Joy reviews the client's portfolio directly in Microsoft Dynamics 365 CE thanks to an easy integration using the Dataverse.

9:45 AM

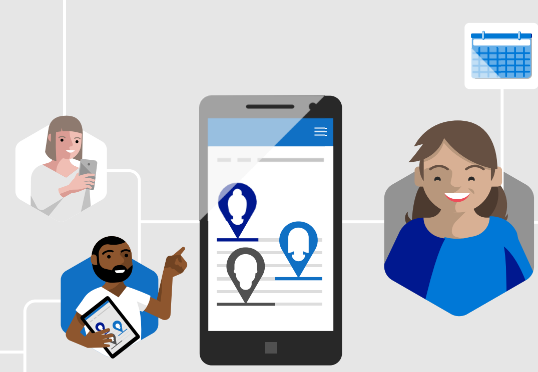
Make last-minute changes

After reviewing the draft proposal, Joy and Cesar collaborate together to finalize the document directly in Microsoft Dynamics CE, avoiding different versions and making sure the final product is perfectly proofed and ready to go.

11:50 AM

Tag for task management

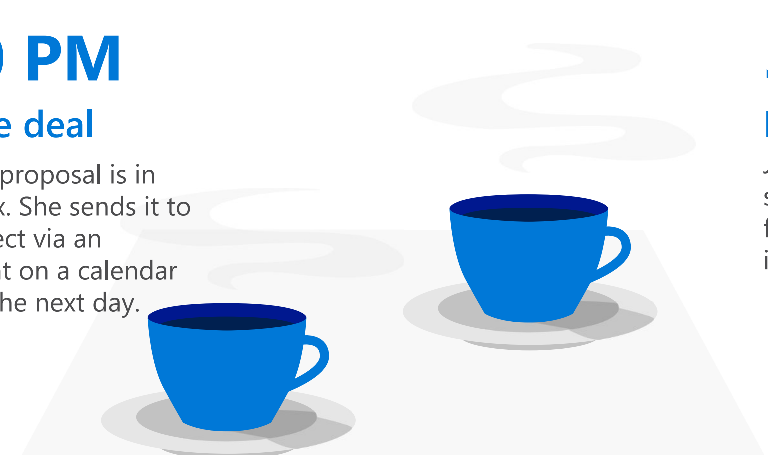
Checking email before lunch, Joy sees she's been @tagged to provide feedback on potential stock holdings. Joy sets a task reminder to research and follow up tomorrow.



1:30 PM

Seal the deal

Alert! The proposal is in Joy's inbox. She sends it to the prospect via an attachment on a calendar invite for the next day.



3:00 PM

Follow up fast

Joy shares her calendar with Wade so he can set up an optimal time for a team training on a new insurance product.

8:00 PM

Skim the headlines

Back at home, Joy puts her feet up and skims industry news. She sees an article she wants her team to read, and forwards the link with a delivery delay[1] to the next morning.

1. Feature only available in Outlook client.

Contact us today to realize the benefits of MS-Dynamics 365 CE.

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