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## WORKING AS ONE

Work smarter. Unify business and productivity applications - moving you from what is to what is *NEXT*.





# Discover more. ACHIEVE MORE.

To get an edge, your business needs to make every minute count. Every time you contact a customer it needs to build trust and loyalty.

It's a tough ask if the tools you're using every day aren't pulling in the same direction. Dipping in and out of different applications slows you down, while hard-to-find data makes it tougher for teams to share ideas or see the bigger picture. This, in turn, hinders decision-making and makes it more time-consuming.

***What if you had a unified set of business management tools and applications to bring you insights from finance, sales or operations, when you need it?***

It would allow you to spend less time looking for information and more time managing your business – helping you to achieve your *NEXT!*

**The good news is, this is possible.** Today's cloud-based solutions, delivered by over 30 years of Velosio's business system expertise, are able to talk to each other. What's key

is for your suite of productivity applications and your business management solution to work as one, to get the best out of both.

If you're responsible for making sure your business performs as well as it can, you may ask yourself: how do I make sure our processes, people and data are seamlessly connected as possible? What do everyday tasks start to look like when I consider our solutions together? And what benefits can I expect to see?

**We'll explore these questions in the following pages.**

# Greater efficiency. BETTER EXPERIENCES.

The cloud puts synchronized business solutions firmly within your reach. A common platform lets you unify relationships, processes and data and all through the applications you use on a daily basis. From this position, your teams can drive efficiency and serve customers effectively.

Suddenly, making information available is the default, not another overhead. Update a document, report, or project in one location, and it will sync and update in another. In the cloud it's also easier to adopt new features or

technology, such as business analytics or artificial intelligence. These solutions turn your data into meaningful insights to make better, more informed, faster decisions – providing immediate impact. Velosio provides rapid cloud deployment and lower cost of ownership methodologies.

Coupled with Velosio's rapid cloud deployment methodologies, these solutions turn your data into meaningful insights to make better, more informed, faster decisions – providing immediate impact.

*Below, we'll look at the two main advantages that you get from making your productivity and business applications work as one:*

- **Productivity through better collaboration**
- **Data insights that drive better decision-making**

Businesses demand solutions that provide immediate impact. Velosio provides rapid deployment and lower cost to ownership methodologies.





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## Work together. WORK FASTER.

When your business applications feed into your everyday productivity applications, and vice versa, it brings people together and helps everyone in your organization to be more productive.

For example, let's say that you have a new sales opportunity. People from across your business need to work together to build a presentation to capitalize on the opportunity. So, they use your collaboration workspace to plan and co-author the sales deck. Without leaving this workspace, they can also pull in relevant customer or financial information with ease. Everyone is looking at the most up-to-date version and it draws on insights from your business data.

The result? The team put together a personalized presentation that resonates with the customer.

***No switching from one application to another. No comparing and consolidating feedback. The team saves time and effort because everyone is using unified business and productivity applications and solutions to work as one.***

Repeat this efficiency again and again, and you can see how much time it frees up to drive additional sales or add value for your existing customers.

This example is about a specific process becoming more efficient. Behind this, though, are the principles

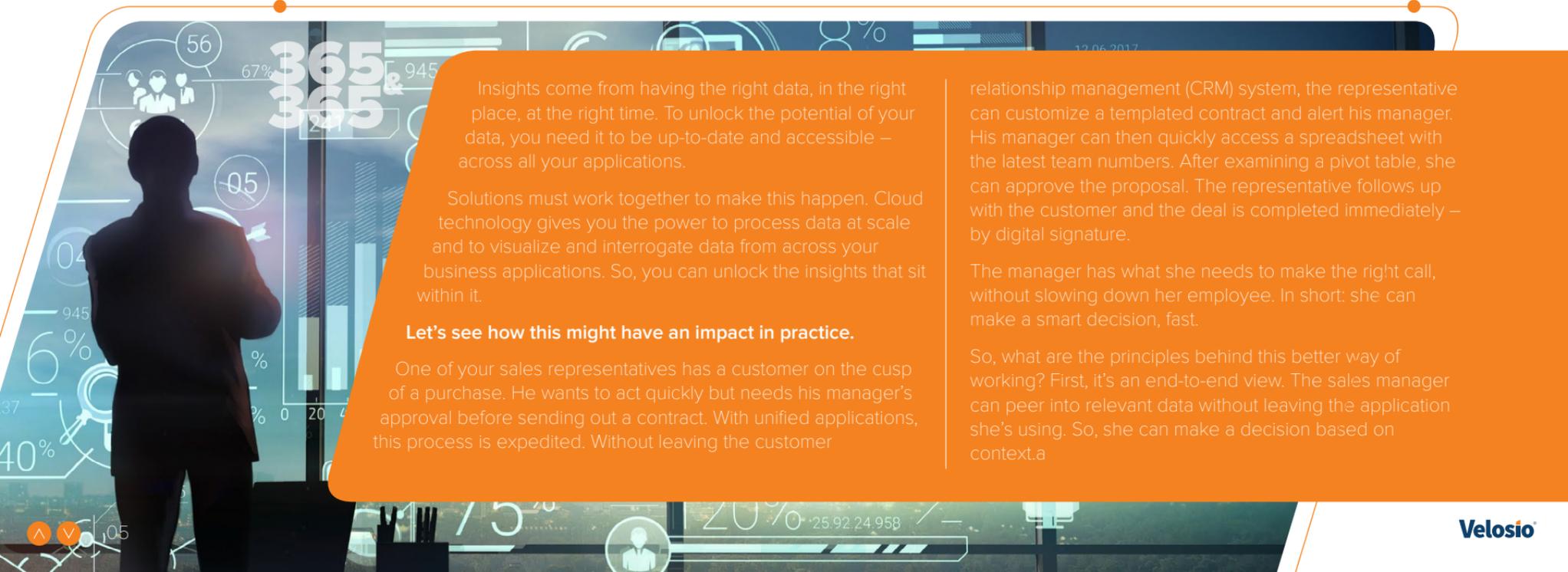
of automating routine tasks and giving people data automatically – in the applications they're used to. This familiarity, in turn, reduces the time taken to train people on using different solutions.

Let's take another situation. Your company receives an email from an important customer who needs you to fulfill an order at short notice. Your sales manager checks inventory, straight from her inbox, and discovers you don't have enough stock. Still in her email, she creates and sends a purchase order to your supplier to make up the shortfall. Then, in the same interface, she creates and sends a quote to the customer.

**Through compatible and intuitive applications, an urgent job is dealt with quickly and accurately.**

However effective your current business and productivity applications are, if they work in silos, the responsibility falls on your employees to connect data and insights to make decisions. This is inefficient and it invites human error. It can also hold you back from providing great customer experiences. If your productivity and business applications work as one, then your technology helps you to be far more efficient and to serve your customers better.

# Accurate data. SMARTER DECISIONS.



Insights come from having the right data, in the right place, at the right time. To unlock the potential of your data, you need it to be up-to-date and accessible – across all your applications.

Solutions must work together to make this happen. Cloud technology gives you the power to process data at scale and to visualize and interrogate data from across your business applications. So, you can unlock the insights that sit within it.

## Let's see how this might have an impact in practice.

One of your sales representatives has a customer on the cusp of a purchase. He wants to act quickly but needs his manager's approval before sending out a contract. With unified applications, this process is expedited. Without leaving the customer

relationship management (CRM) system, the representative can customize a templated contract and alert his manager. His manager can then quickly access a spreadsheet with the latest team numbers. After examining a pivot table, she can approve the proposal. The representative follows up with the customer and the deal is completed immediately – by digital signature.

The manager has what she needs to make the right call, without slowing down her employee. In short: she can make a smart decision, fast.

So, what are the principles behind this better way of working? First, it's an end-to-end view. The sales manager can peer into relevant data without leaving the application she's using. So, she can make a decision based on context.



**And context can be everything. Let's take another example.**

Another sales representative receives an email from a customer who would like a quote on some items. The solution reads the body of the email and recognizes the sender. This means the representative has access to the customer's current quotes and can easily pull up the customer record in her email. From this view, she reviews the account. She can see the customer's current quotes, ongoing

orders and sales history. As she creates the quote, it auto-populates with customer and product details and line items suggested by the cognitive services built into the solution. It all means the representative can get the job done faster.

The representative avoids duplication and improves her approach. She also enhances her productivity by utilizing accurate, up-to-date data.

In the cases above, the sales team is able to communicate better and faster with their customers. Accurate data, refreshed across programs, leads to better decisions in every aspect of your business. Whether it's a personalized offer to a customer or a shift in how you and your employees work.

## Move forward as one.

If you are running your business today using multiple applications and productivity tools, you may be keeping data and people apart. By treating your solutions as one ecosystem, you optimize how your business performs. Allowing you to draw on their integrated capabilities as well as their individual strengths.

Leveraging the capabilities together allows you to align your operations, financials, sales, and service. This both supports collaboration internally and with customers and generates meaningful insights. Once this happens, you'll see your processes, customer interactions and decisions all improve. So, you can unlock what's *NEXT* for your business.

Velosio is a leader in deploying business applications through the cloud and delivering unparalleled client experiences. One of the largest Microsoft partners in North America, Velosio supports the entire Microsoft Dynamics portfolio, Office 365 family and Azure services. The solutions portfolio includes ERP, CRM, Productivity, Business Intelligence and Power Platform. Velosio is the only Microsoft Cloud Distributor that specializes in Dynamics 365 and is a prominent Microsoft Master VAR. Headquartered in Columbus, Ohio, Velosio serves over 4,000 clients from more than 40 offices in the US and Canada.

## 365 & 365

One way to make your business applications and productivity tools work together is to use both **Microsoft Office 365 and Dynamics 365**.

They unite your people and processes, which helps you to drive up performance and deliver great customer experiences.

To learn more, visit <https://d365bc.velosio.com/>

Want to speak with our Velosio business development team today?

Call: **888.725.2555** | Email: [info@velosio.com](mailto:info@velosio.com)