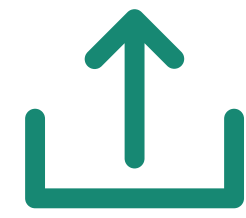


DocDrive365

links documents to dynamics



EBOOK



CRMCS

HELLO...

Welcome to the DocDrive365 EBOOK...

If you're reading this, then you're in luck! Maybe you've been using Dynamics 365 CRM for a while or completely new to the idea and thinking about adopting a CRM system but also use and store your information / documents in SharePoint and Microsoft Teams...

Can you relate?

- **Information Overload - working virtually you have an ever increasing number of channels; how do you keep organised without overload and burnout?**
- **The Cloud has an amazing Platform of Apps and Bespoke Customisation but how do I get our base right? Where do I get started?**
- **Emails, Documents, Chat, our 'unstructured data', how do I/we make sure this is well managed and information is not lost in the data?**

the
catch up



the basics

Let's briefly introduce ourselves – We are a specialist Microsoft Partner in Dynamics 365 and Integrated Solutions throughout the Microsoft environment. Alongside being founders of Microsoft AppSource approved DocDrive365.

We also provide D365 Project Consultancy, D365 Marketing, Dashboards & Predictive Analytics (buzz word AI), PowerApps Portals, and Bespoke Projects in addition to DocDrive365.

As an SME, our team of 7 have unique specialisations in Document Management, Complex Case Management, and Asset Management, with a focus on enabling client engagement online and in the field of corporate compliance. To that end, we invest in ongoing research, development, and training to help our clients and employees get the most out of today's skill and tech-based economy.

Our MD, Paul McQuillan is Solutions Architect and CRMCS Managing Director, with 15 years' of Dynamics experience working for Touchstone, Xpedition and Pythagoras before founding CRM Consultancy, which is a successful specialised Microsoft Partner who recently launched Microsoft AppSource approved DocDrive365.





FLW 4.0 London

We recently attended the fastest growing in-person Legal Tech conference in the UK in 2021, hosted by the incredible team at Cosmonauts.

Future Lawyer Week UK 4.0 (#FLWUK) is a 3-day interactive legal innovation event filled with networking opportunities, and thought provoking discussions specifically designed for in-house legal counsels and private practice law firms.

We were lucky enough to present on Day 2 (Private Practice Legal) with **Connect the Dots in the Microsoft Cloud with Teams, Docs and Data**. This was LIVE streamed via Linked-In which is available on our CRMCS Linked-In or YouTube



CRM Consultancy



CRMCS



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FLW 4.0 London

It was such a great event and we will definitely be back in 2022 for more. You will be able to pre-register for next year's Future Lawyer Week with an additional perk of **discount 10%** on all sponsorship packages and tickets bought between now and 1st January 2022.

SNAPSHOTS OF #FLWUK



#FLWUK
#LegalTech



the proof is in the pudding

Learn more about DocDrive365 from our own customers, as well as our informative/technical articles for getting started, updates, and stories:

- [DocDrive365 - How To Articles](#)
- [DocDrive365 - News & Updates](#)
- [DocDrive365 - Getting Started Guides](#)

If you don't believe us, believe them...

Case Studies

- [Baskerville Drummond's Case Study](#)
- [KeeSafety Case Study - Request](#)

Dynamics Day In The Life Articles

- [Puma Investments - Financial Services](#)
- [Money Penny Release Management](#)
- [NorthEdge Capital LLP](#)

Webinar's

- [PJ Pipe & Valves - Creating Sales Excellence with Dynamics 365 & Microsoft Teams](#)
- [Puma Investments - Managing Investment Reporting with DocDrive365 & Azure Cognitive Services](#)

CONTACT DETAILS



Just open your iphone or andriod camera and scan here to pop our details directly into your phone. Your welcome.

the details

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