



Unlocking Efficiency With Microsoft Power Pages & CRM

August 15, 2024

Microsoft
Partner

forv/s
mazars

Global Presence

Top 10

Global Network*

\$5bn

Combined Revenue (2023)

100+

Combined Countries & Territories

400+

Combined Offices & Locations

1,800+

Combined Partners

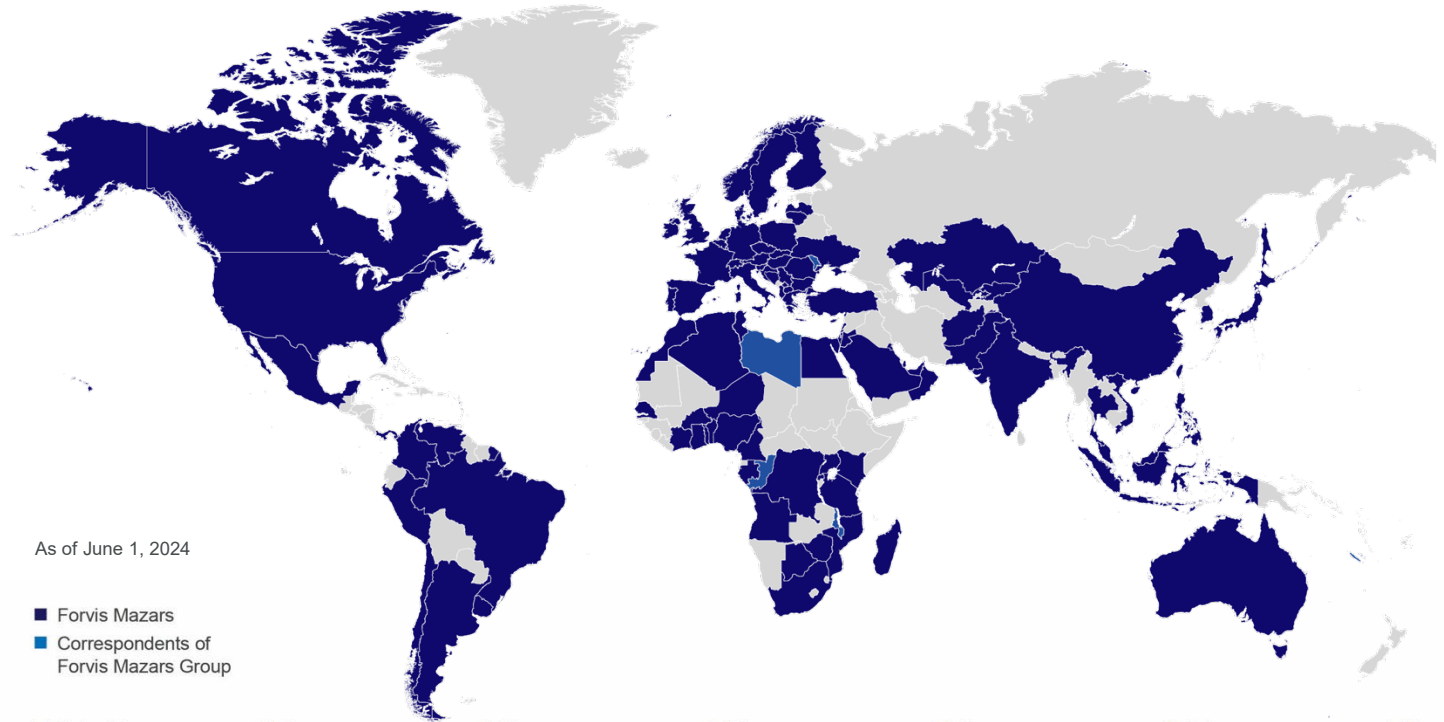
40,000+

Combined Employees

* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (expected) \$3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



As of June 1, 2024

- Forvis Mazars
- Correspondents of Forvis Mazars Group

- | | | | | | | |
|--------------------------|--|--------------|--------------|-------------------|----------------|------------------------|
| ■ Afghanistan | ■ Cameroon | ■ France | ■ Korea | ■ Morocco | ■ Qatar | ■ Togo |
| ■ Albania | ■ Canada | ■ Gabon | ■ Kosovo | ■ Mozambique | ■ Romania | ■ Tunisia |
| ■ Algeria | ■ Cayman Islands | ■ Germany | ■ Kuwait | ■ Netherlands | ■ Rwanda | ■ Türkiye |
| ■ Angola | ■ Chile | ■ Ghana | ■ Kyrgyzstan | ■ New Caledonia | ■ Saudi Arabia | ■ Uganda |
| ■ Argentina | ■ China | ■ Greece | ■ Latvia | ■ Niger | ■ Senegal | ■ Ukraine |
| ■ Australia | ■ Colombia | ■ Hong Kong | ■ Lebanon | ■ Nigeria | ■ Serbia | ■ United Arab Emirates |
| ■ Austria | ■ Congo | ■ Hungary | ■ Libya | ■ North Macedonia | ■ Singapore | ■ United Kingdom |
| ■ Bahrain | ■ Côte d'Ivoire | ■ India | ■ Lithuania | ■ Norway | ■ Slovakia | ■ United States |
| ■ Belgium | ■ Croatia | ■ Indonesia | ■ Luxembourg | ■ Oman | ■ Slovenia | ■ Uruguay |
| ■ Benin | ■ Cyprus | ■ Ireland | ■ Madagascar | ■ Pakistan | ■ South Africa | ■ Uzbekistan |
| ■ Bermuda | ■ Czech Republic | ■ Israel | ■ Malawi | ■ Palestine | ■ Spain | ■ Venezuela |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Italy | ■ Malaysia | ■ Panama | ■ Sweden | ■ Vietnam |
| ■ Botswana | ■ Denmark | ■ Japan | ■ Malta | ■ Peru | ■ Switzerland | ■ Zimbabwe |
| ■ Brazil | ■ Egypt | ■ Jordan | ■ Mauritius | ■ Philippines | ■ Taiwan | |
| ■ Bulgaria | ■ Finland | ■ Kazakhstan | ■ Mexico | ■ Poland | ■ Tanzania | |
| ■ Burkina Faso | | ■ Kenya | ■ Moldova | ■ Portugal | ■ Thailand | |

Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes and strategies for future operations
- Designing and implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions



Business Technology Services

ERP

- Microsoft Dynamics 365
 - Enterprise
 - Finance
 - Supply Chain
 - Commerce
 - SMB
 - Business Central
 - Dynamics GP
- NetSuite
- Sage & Sage Intacct

CRM

- Microsoft Dynamics 365
 - Sales
 - Service
 - Marketing
- Salesforce
- Marketing Automation

Advanced Technology

- Insights
 - Microsoft Power BI
 - Solver CPM
- Automation
 - Microsoft Power Platform
 - Robotic Process Automation (RPA)
- App Development

Managed Services for business applications, IT, & cyber support.

Microsoft Partner

ORACLE NETSUITE
Solution Provider

Sage Partner

salesforce PARTNER

solver

forvis
mazars

Today's Presenter

Microsoft Practice

“Our team is focused on delivering an Unmatched Client Experience[®] on every engagement.”

– Chad Back, Partner



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Microsoft
Partner

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Objectives

1. Describe how to create & design a new Power Page using low-code techniques
2. Discuss how to use Power Pages to automate lead creation
3. Define how to build a customer self-service portal using Power Pages



01

Create a Power Page

Learn how to create & design a new Power Page using low-code techniques.



Why Use a Power Page?



Low-Code Development

- Visual approach to software development
- Build applications through user interfaces & configuration
- Lowers or eliminates need to write code to customize

Benefits of Low-Code for Non-Developers

- Accessibility
- Faster development
- Cost-effective
- Improved agility

Potential Risks of Low-Code Development

- Governance & compliance issues
- Security vulnerabilities
- Lack of integration
- Technical debt or maintenance burden
- Scalability
- Limited customization



Demo

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02

Power Page Automation

Discover how to use Power Pages to automate lead creation.



What Is Lead Automation?



Lead automation helps improve the sales pipeline by automating lead capture, management, & nurturing. It leverages technology to collect, score, & engage leads effectively, reducing manual work & boosting efficiency.

Why Is Lead Automation Important?



Increase Efficiency

Improve Consistency

Automate Management

Gain Data-Driven Insights

Nurture Leads

Scale With Ease

How Can Power Pages Help With Lead Automation?



Power Pages can create data-driven, connected web experiences that streamline lead capture & engagement & can be used for:

- Lead capture forms
- Direct CRM integration
- Automation workflows
- Lead scoring
- Segmentation & targeting
- Analytics & reporting

Demo

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03

Customer Portal

Explore how to build a customer self-service portal using Power Pages.



What Is a Self-Service Portal?

- Microsoft's portal technology is called Microsoft Power Pages
- Microsoft Power Pages is a secure, enterprise-grade, low-code software as a service (SaaS) platform for creating, hosting, & administering modern external-facing business websites
- Whether you're a low-code maker or professional developer, Power Pages empowers you to design, configure, & publish websites quickly that work across web browsers & devices



What Features Does a Self-Service Portal Offer?

User Authentication & Account Management

- Secure user authentication
- Account management tools so users can update their profiles, change passwords, & manage preferences

Multichannel Support

- Integration with various communication channels such as email, chat, & social media
- Consistent user experience across different devices & platforms

Branding

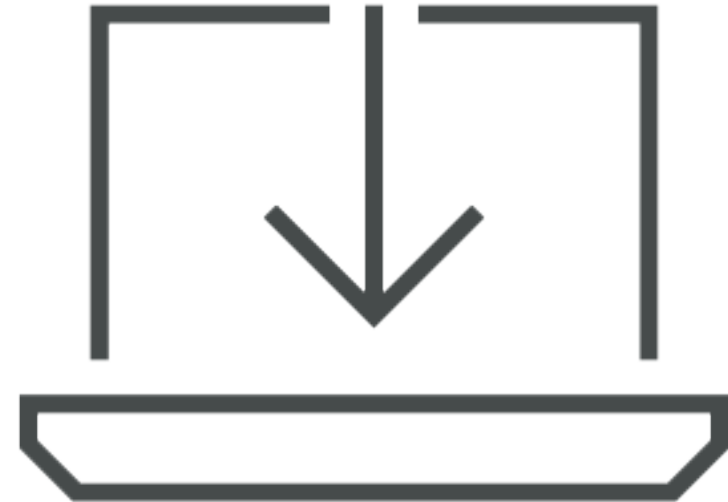
- Ability to customize logo & color schemes to match your organization's branding

Integration With CRM Systems

- Seamless integration with Dynamics 365 for real-time access to customer data
- Ability to view & update account information, track orders, & manage subscriptions

Personalization

- Personalized user dashboards based on individual preferences & previous interactions



What Features Does a Self-Service Portal Offer? (continued)

Mobile Responsiveness

- A mobile-friendly design that helps users access the portal from smartphones & tablets
- Responsive layouts for optimal usability on various screen sizes

Analytics & Reporting

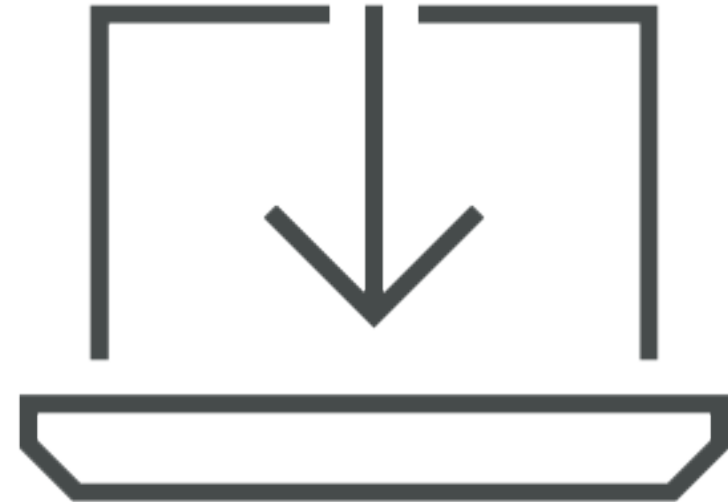
- Tracking & reporting tools to monitor portal usage, popular search queries, & customer feedback
- Insights that can inform improvements to content & services

Automation & Chatbots

- Automation features to handle routine tasks & processes without human intervention
- Integration of chatbots to provide instant responses & assist users in real-time

Multi-Language Support

- Support for multiple languages to cater to a diverse customer base
- Localization features to adapt content & interfaces to different regions



How Can a Self-Service Portal Benefit My Organization?



- **24/7 Accessibility**



- **Reduced Workload for Service**



- **Cost Savings**



- **Faster Issue Resolution**



- **Improved Customer Satisfaction**

How Can a Self-Service Portal Benefit My Organization? (continued)



- **Enhanced Productivity**



- **Personalization & Customization**



- **Data Insights**



- **Scalability**



- **CRM Integration**

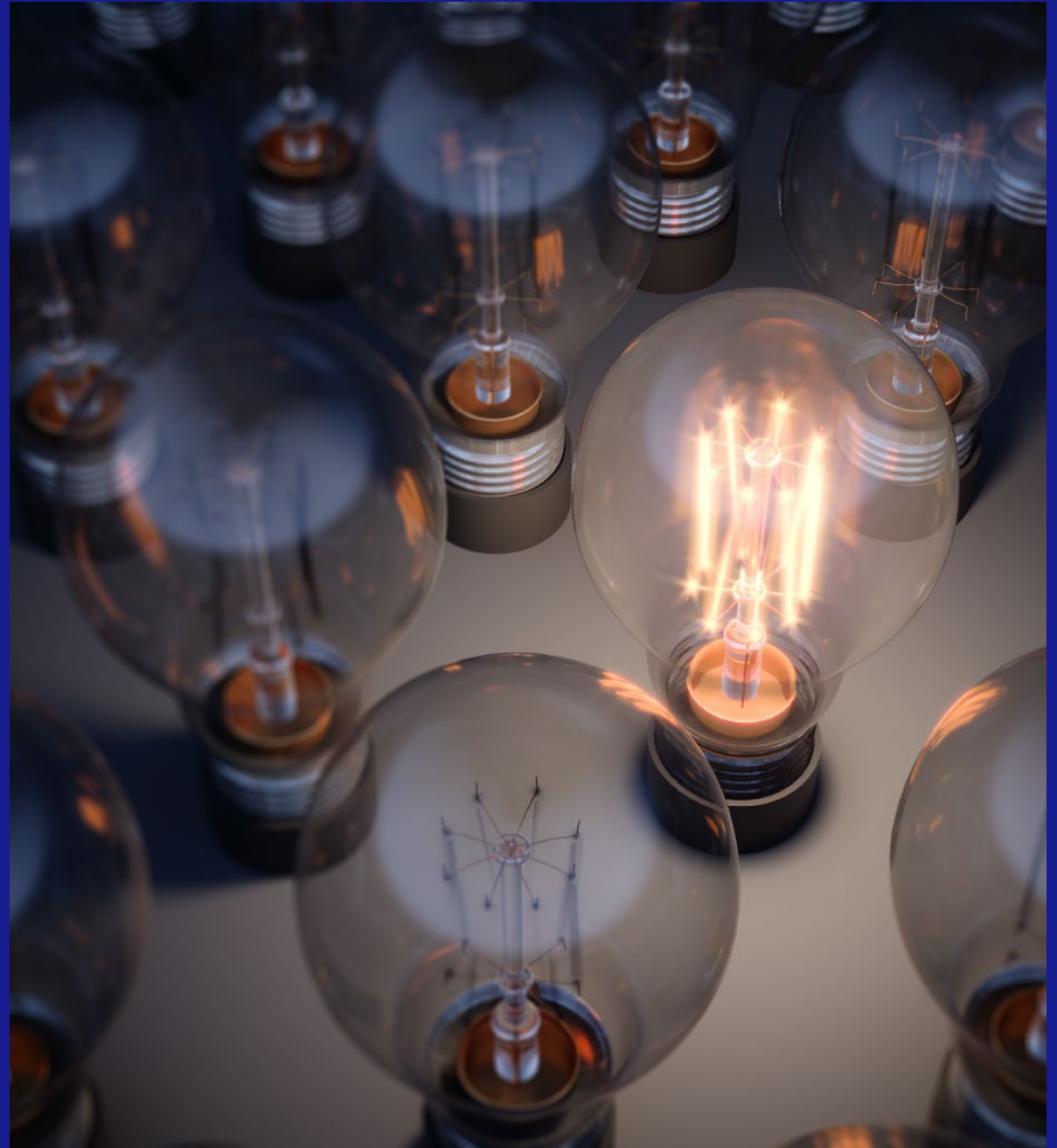
Demo

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Other Things To Consider

- Can be combined with Microsoft Dynamics 365 Business Central or Finance when data is synchronized to Dataverse
- Dataverse integration is seamless
- Licensing can be tricky to understand
- While these look simple, you need to make sure they don't become too complicated or they can become problematic to maintain



Q&A



Business
Technology
Services

Questions?

CPE CREDIT

- CPE credit may be awarded upon verification of participant attendance
- For questions, concerns, or comments regarding CPE credit, please email FORVIS at cpecompliance@us.forvismazars.com



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