STOP LETTING CRM ISSUES KILL YOUR MOMENTUM



866-234-5103

When your CRM stalls, so does your revenue engine. We get it humming with smart improvements every single month.

YOUR CRM SHOULD BE A CATALYST – NOT A CHOKEPOINT



Most CRM systems stall out after "Go-Live."
Fixes take too long. Teams stop using it. Small issues stack up until the system becomes a source of frustration instead of a driver of growth.

The **Optrua Care Plan** solves that. We proactively maintain, enhance, and support your Microsoft Dynamics 365 CRM—so your team can move faster, stay aligned, and focus on closing deals. No full-time hires. No drawn-out projects. Just ongoing momentum.

YOUR CRM TEAM – WITHOUT THE OVERHEAD



- You don't need to hire a full-time CRM admin, developer, and business strategist to keep your system running at its best.
- With the **Optrua Care Plan**, you get a fully developed CRM team—ready to maintain, enhance, and evolve your Dynamics 365 environment without adding headcount.
- You stay in control of priorities. We handle the details, execution, and follow-through— you get continuous improvement month after month.

OPTRUA
Smarter Systems. Better Sales.

866-234-5103 optrua.com

WHICH PLAN FITS ME BEST?

THREE PLANS. ONE GOAL: KEEP CRM WORKING FOR YOUR BUSINESS

Whether you're just getting started, scaling your sales organization, or running a complex multi-team operation—there's an **Optrua Care Plan** built to match your size, systems, and stage of growth.

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MONTHLY SUBSCRIPTION	Pro Plus $9,950	Pro $6,950	Team $3,950
VISION, STRATEGY, PLANNING			
System Assessment	✓	✓	✓
Technology Roadmap	✓	✓	✓
Strategic Planning Meeting (Quarterly)	✓	✓	✗
RAPID DEVELOPMENT & ENHANCEMENTS			
Managed Dev/Test/Prod Environments	✓	✓	✓
Dynamics CRM Development	✓	✓	✓
Power Platform Development	✓	✓	✓
Monthly Development Iteration(s)	✓	✓	✓
MAINTENANCE & SUPPORT SERVICES			
Preventative Maintenance	✓	✓	✓
Technical Support Services	✓	✓	✓
Managed System Upgrades	✓	✓	✓
Power Platform & CRM Admin	✓	✓	✓
Power User Training	✓	✓	✓
ISV and 3rd Party App Support	✓	✓	✓
Client Support Portal	✓	✓	✓
Response Time SLA (hours)	2	4	6
FLEXIBLE ENGAGEMENT			
Service Hours/Month	60	40	20
Addt'l Project Work (Standard Rate Discount)	18%	15%	10%
Rollover Unused Hours	✓	✓	✓
Cancel Anytime w/30 Days Notice	✓	✓	✓

CHOOSE THE PLAN THAT WORKS BEST FOR YOU:

Pro Plus
Built for high-growth organizations ready to optimize CRM as a true revenue engine.
Perfect for companies running on complex processes, cross-functional teams, and aggressive growth targets.

Pro
For growing teams that need expert CRM support and steady improvements.
Best for organizations looking to reduce CRM friction and align technology with business goals.

Team
Perfect for small teams or early-stage CRM initiatives.
Ideal for teams who need reliable help and occasional enhancements without a heavy lift.