

CRM Business Process Review:

4 Days +
Full Report

*Understand your
business processes and
discover how you can
maximize your Dynamics
365 technology, or start
from scratch*



What's included:

- Comprehensive review of end-user processes and current overall system in a select department or area
- Full written report including recommendations for process improvements
- Visually engaging flow map to best understand suggested changes

Microsoft
Partner



Gold Cloud Platform
Gold Cloud Productivity
Gold Enterprise Resource Planning
Gold Customer Relationship Management
Gold Cloud Customer Relationship Management

Agenda

Workshop + Review - Days 1 & 2

- ✓ Meet with leadership team to discuss existing business processes and their current engagement with Microsoft Dynamics 365 platform in a select department or area
- ✓ Establish core focus areas through engagement with end users, on business objectives, current challenges, and expectations surrounding Microsoft Dynamics 365
- ✓ Host a dynamic workshop to develop a business process map, and determine procedures, deliverables and expectations of the analysis process

Gap Analysis - Days 3 & 4

- ✓ Develop a concise picture of current process flows (for example, from the generation of a lead to the close of an opportunity)
- ✓ Pin-point shortcomings of reporting and KPIs by leveraging the Microsoft Dynamics 365 dashboard to generate sharper, smarter reports

Since every business is unique, our analysis will seek to address your business's specific needs. For example:

- ✓ For Sales: Establish a Sales Pipeline, and determine stage-3 and must-win opportunities
- ✓ For Customer Service: Understand the backstory of high-priority case volumes and case resolution times
- ✓ For Marketing: Critically assess variables surrounding lead generation by campaign and lead qualification times

Conclusion - One week later

- ✓ Schedule a meeting several days after the delivery of the final report
- ✓ At the meeting, walk step-by-step through its recommendations and devise a business-wide approach to resolving underlying issues.

Your report

Our conclusive report provides a structured analysis of your current processes plus recommendations on how you can better leverage the full capabilities of the Dynamics Platform for your business. It features simple-to-follow comments, which are clearly cross-referenced across all sections of the report.



Disclaimer:

AlfaPeople will assess your organization's needs and provide an estimate of work before committing to any projects. At project kick off, AlfaPeople will identify if the work is likely to exceed 4 days and will present you with a separate proposal.