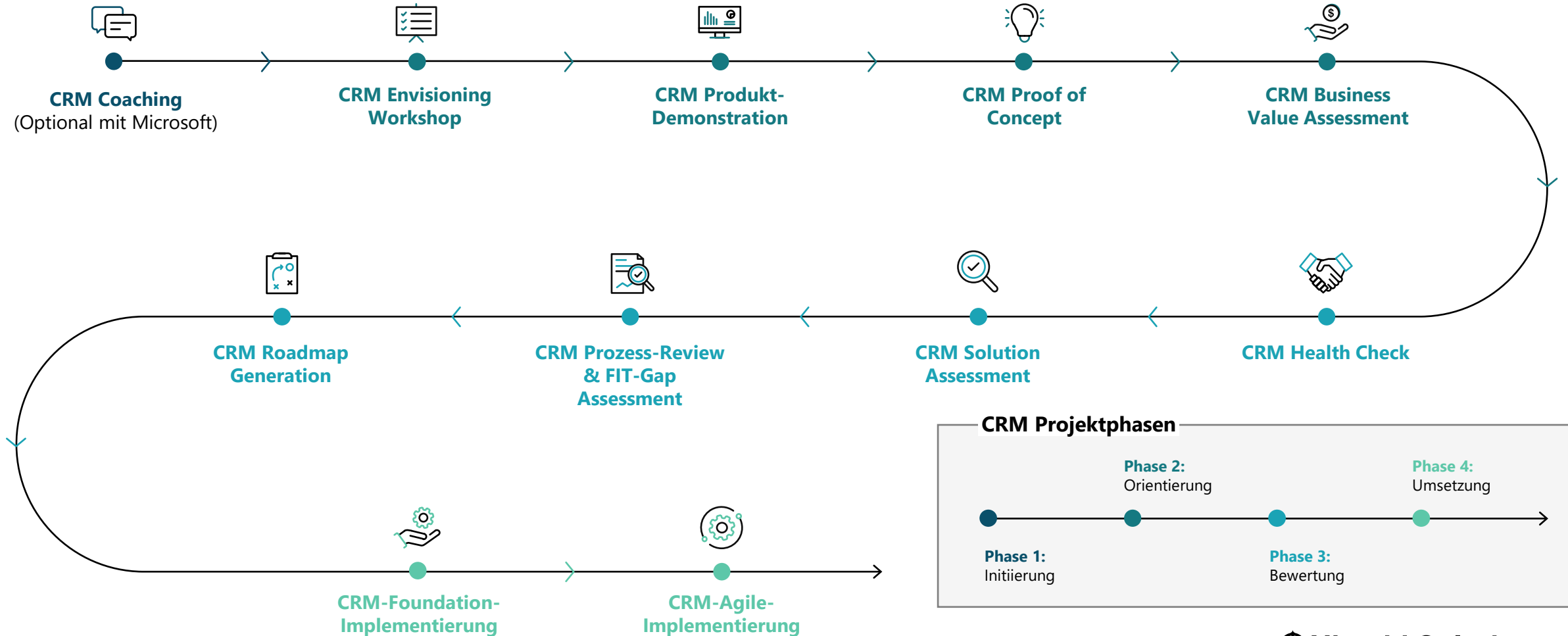


Unsere Angebote entlang Ihres CRM Vorhabens

Wir begleiten Sie von der Business-Analyse über die Zieldefinition bis zur Implementierung und langfristigen Optimierung Ihres CRMs



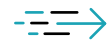
Angebot: CRM Health Check



Fragestellungen & Herausforderung

Sie wünschen sich eine (Neu-)Bewertung Ihrer CRM-Lösung und möchten u. a. folgende Fragen klären:

- ✓ Nutze ich das volle Potenzial meines CRM-Systems?
- ✓ Wie gut ist mein CRM-System integriert?
- ✓ Werden die neuesten Funktionalitäten genutzt?
- ✓ Gibt es potenzielle Limitationen bei der Lösung?
- ✓ Wie kann ich Prozesse verbessern?



Ablauf & Kerninhalte

Analyse

- ✓ Wir analysieren Ihre aktuelle CRM-Lösung aus drei Perspektiven mit strukturieren Fragebögen:
 1. Geschäftsperspektive
 2. Technologieperspektive
 3. Organisations- und Nutzerperspektive

Bewertung

- ✓ Wir bewerten die Erkenntnisse aus der Analyse und bereiten sie strukturiert auf
- ✓ Die Erkenntnisse analysieren wir mit Ihren CRM-Verantwortlichen

Abschluss

- ✓ Abschließend leiten wir konkrete Empfehlungen (basierend auf Best Practices) ab
- ✓ Als Ergebnis erhalten Sie einen quantifizierten Ergebnisbericht



Ergebnisse & Mehrwerte

- ✓ Wir identifizieren Faktoren, welche die Funktionen Ihres CRM-Systems beeinflussen/limitieren können
- ✓ Wir analysieren optimierbare Bereiche und bewerten sie strukturiert
- ✓ Wir sprechen konkrete Handlungsempfehlungen aus



Zeitleiste

— Tage — 1 — 2 — 3 — 5 — 7 — 9 —

Analyse (Interviews)

Bewertung

Abschluss



Investment

Ca. **8**
Projekttag

Beispiele: CRM Health Check

Pillar	Category	#	Questions	P1	P2
Transformation	Business-led	111	Each of the business stakeholder teams impacted by the solution has been involved in the planning, design and assessment of the solution.	2	7
Transformation	Business-led	112	The solution design has been defined by business strategy and process needs – versus the desired business processes being adapted to match the technology capabilities.	4	7
Transformation	Value driven	135	Employees and their managers measure performance using dashboards or data from the Dynamics 365 solution.	2	5
Process & Technok Alignment		211	Are business processes standardized, well documented, and followed?	5	8
Process & Technok Alignment		212	Employees understand how each step of the process is aligned to and supports the business goals.	4	7
Process & Technok Alignment		213	Compared to prior process, the current solution saves employees time, steps, or clicks to complete their work.	5	6
Process & Technok Alignment		214	The solution user experience is streamlined so employees do not have to see fields, forms or enter data that's irrelevant to their roles.	4	7
Process & Technok Alignment		215	New employees require do not require separate technology training because the Dynamics 365 solution is straightforward and clearly aligned to business process training.	4	1

Beispielfragen aus der Analysephase

Alignment	Reliability	Support
- Business processes are standardized, well documented, & followed. - Employees understand how each process step aligns to and supports business goals. - Compared to prior process, the current solution saves employees time or steps. - The user experience is streamlined so users don't have to see fields, forms or enter irrelevant data. - New staff don't need separate technology training because the solution is straightforward and clearly aligned to business process training.	- Employees can quickly and easily get access to the solution. - The solution operates with few errors or performance issues. - Employees can effectively access the solution anywhere, using any device. - Data in the solution is cleansed and kept up-to-date. - Employees and leaders trust the data in the solution.	- Employees know who to call with issues with an established escalation hierarchy. - A plan and budget exist for 'run the business' support of the solution including deploying updates and enhancements. - When business needs change, we update the iteratively to align with business processes. PowerApps are used to extend scenarios and solutions. - Insightful data is treated as a mission-critical solution output and asset. AI and ML are being explored. - The solution is part of a well-defined and supported cloud strategy, with business analysis and process alignment, documentation, data, testing, training, and support.

Beispielerkenntnisse aus der Technologieperspektive