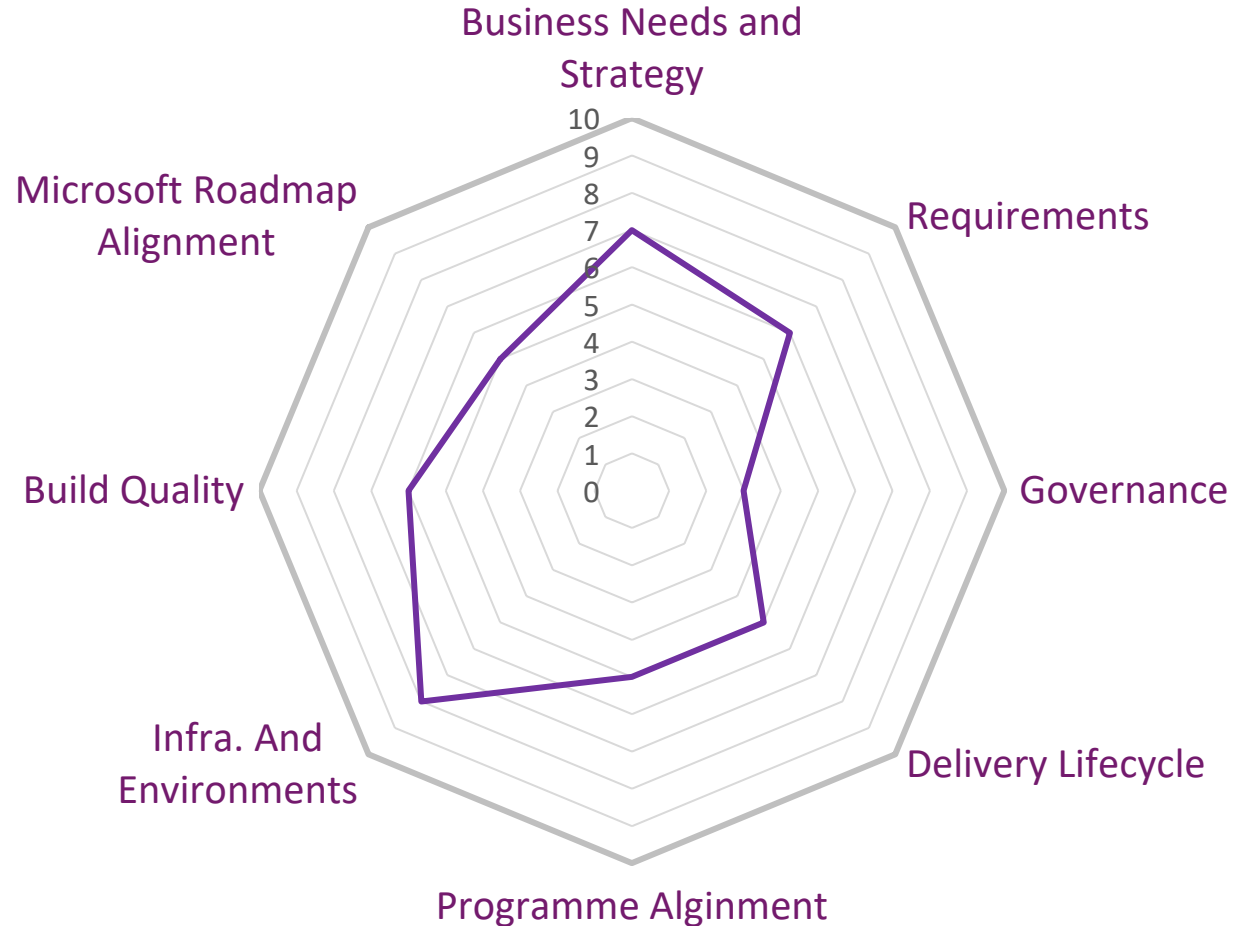# Problem Statement

- Many D365 or legacy Microsoft CRM (On Prem) Customers that can identify with the following
  - Business
    - Poor user adoption
    - Not liked by the business
    - Not delivering expected business benefits
    - Only utilised for a portion of the business (e.g. sales)
    - Lack of reporting / dashboards for users and management
    - Not leveraging latest features and functions that could be delivering benefit (e.g. mobile, AI)

  - Implementation
    - Not continually improving
    - Lack of governance
    - Lack of prioritisation
    - Lack of cost vs benefit analysis
    - Lack of training / user support

  - Solution
    - Stability issues (e.g. performance, errors)
    - Poor data (data integrity, data quality, data enrichment)
    - No management of licence use / storage costs
    - Deployment / release management issues
    - Concerns about over customisation / not aligning with Microsoft best practices

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Discovery Audit Overview Scope

- **Business Alignment** – How well does the overall solution align to the needs of the business and will it deliver the benefits required?

- **Delivery Approach** – What is the process for ensuring effective delivery from design to test and support?

- **Solution Quality** – How well has the solution been implemented with Microsoft best practices and roadmap considered?
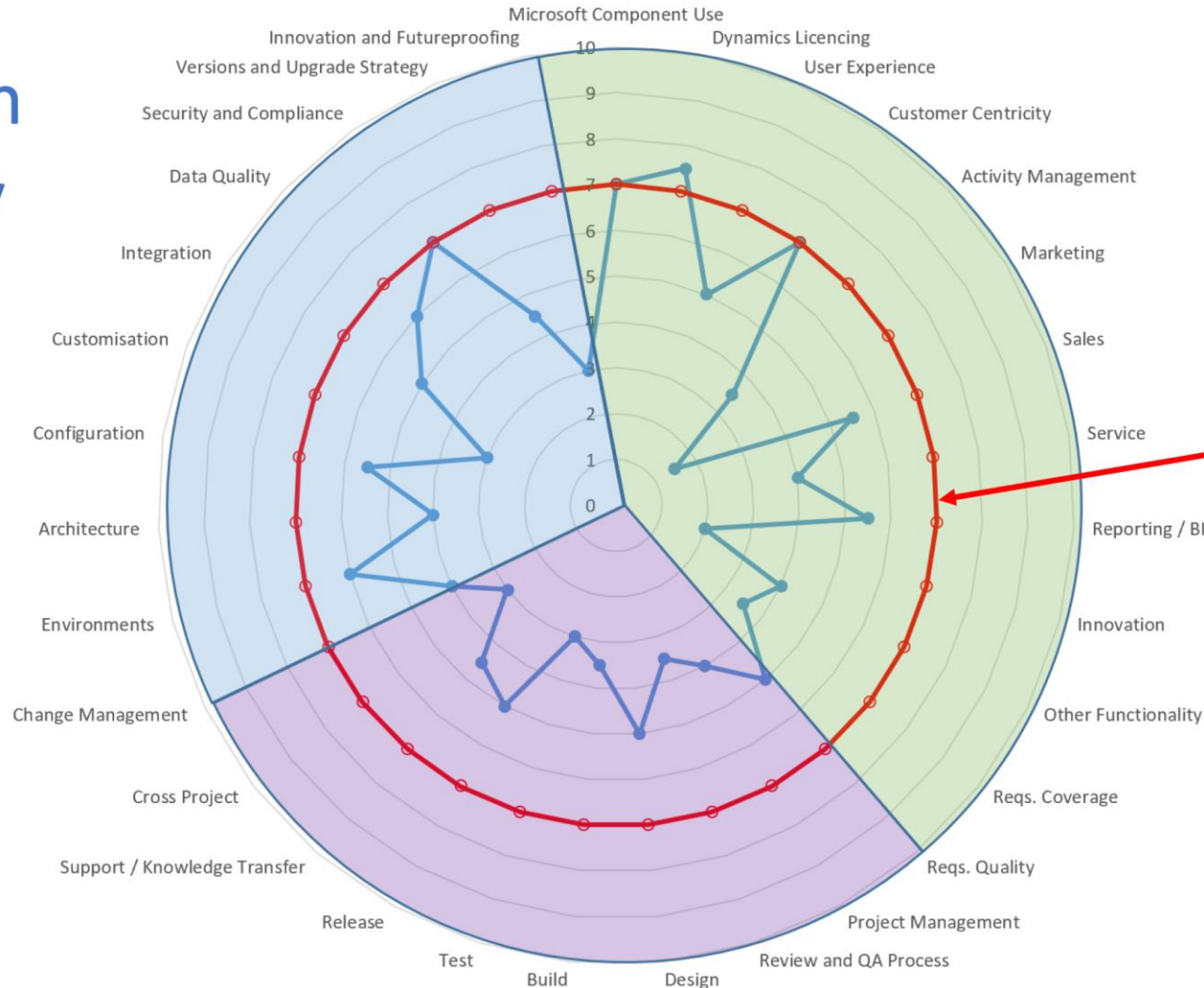
As-Is Assessment – Level 2

Solution Quality

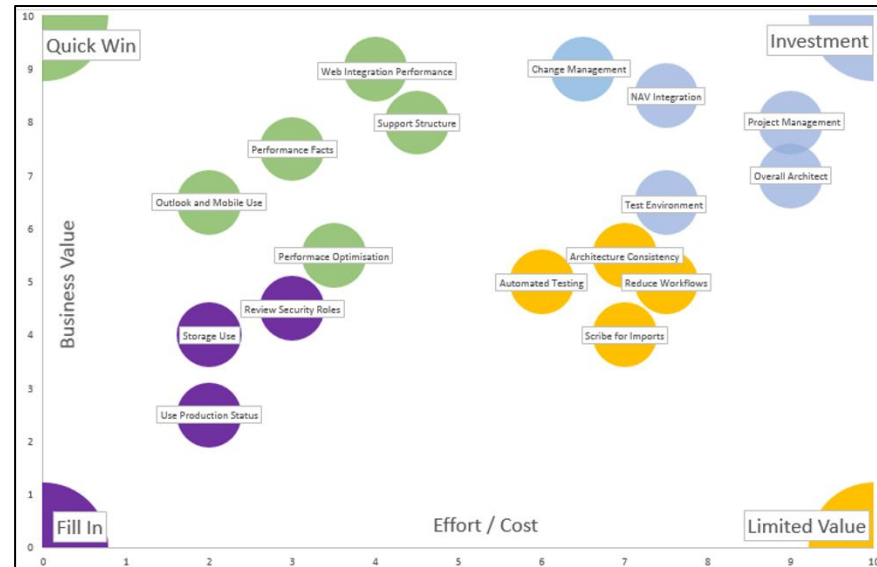Business Alignment

Delivery Approach

Typical target 7/10

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Discovery Audit Deliverables

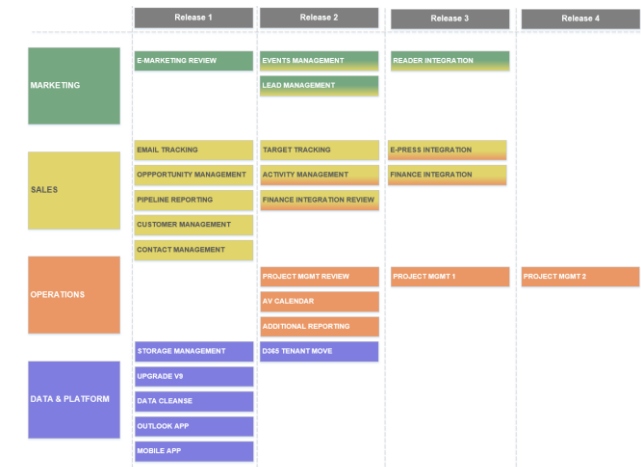| Area	Status	Notes
Requirement Capture		Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris
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Integration and Data Migration		Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris
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Security and Data Protection		consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed

RAG status against key areas

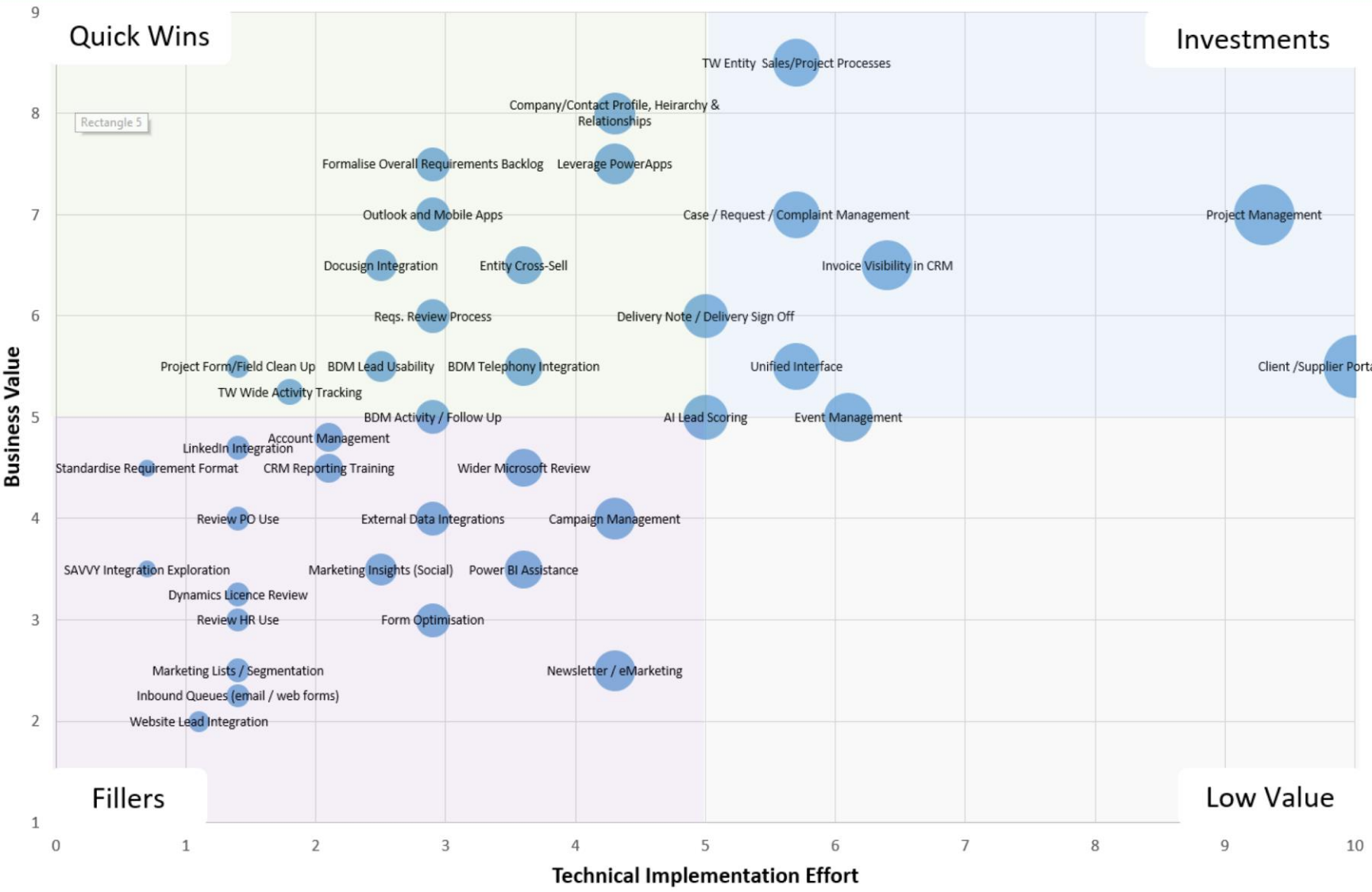*Segmentation of Recommendations to Identify Quick Wins and worthwhile Investments*

Notes on what is working well and what can be improved in different areas

Solution Roadmap suggested phasing of improvements

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Recommendations Matrix – Business Alignment

Chart — Technical Implementation Effort (x-axis, 0–10) vs Business Value (y-axis, 1–9). Quadrants labelled Quick Wins (top-left), Investments (top-right), Fillers (bottom-left), Low Value (bottom-right).

Plotted items:
- TW Entity Sales/Project Processes
- Company/Contact Profile, Heirarchy & Relationships
- Formalise Overall Requirements Backlog
- Leverage PowerApps
- Outlook and Mobile Apps
- Case / Request / Complaint Management
- Project Management
- Docusign Integration
- Entity Cross-Sell
- Invoice Visibility in CRM
- Reqs. Review Process
- Delivery Note / Delivery Sign Off
- Project Form/Field Clean Up
- BDM Lead Usability
- BDM Telephony Integration
- Unified Interface
- Client /Supplier Porta
- TW Wide Activity Tracking
- BDM Activity / Follow Up
- AI Lead Scoring
- Event Management
- Account Management
- LinkedIn Integration
- Standardise Requirement Format
- CRM Reporting Training
- Wider Microsoft Review
- Review PO Use
- External Data Integrations
- Campaign Management
- SAVVY Integration Exploration
- Marketing Insights (Social)
- Power BI Assistance
- Dynamics Licence Review
- Review HR Use
- Form Optimisation
- Marketing Lists / Segmentation
- Newsletter / eMarketing
- Inbound Queues (email / web forms)
- Website Lead Integration
- Rectangle 5

Top 5 Candidates

- Formalise Requirements Backlog
- TW Entity Sales / Project Process
- BDM Lead Usability
- Leverage PowerApps
- Project Form Clean Up