

AI-Powered CRM Roadmap

2-Week Workshop

»» This CRM Vision & Value workshop is designed to provide a clear, actionable strategy for an AI-powered sales and customer engagement transformation through modernizing your CRM to Dynamics 365.

JourneyTeam is dedicated to helping customers by offering expert guidance and strategic planning for CRM modernization. Our proven engagement focuses on assessing current systems, identifying business needs, and developing a tailored roadmap to drive successful CRM transformations. This 2-week workshop provides a detailed plan and actionable steps to ensure a smooth transition, leveraging the full capabilities of Dynamics 365.

Business Outcomes

Our experts will collaborate with your team in workshops to assess your current systems, business needs, and develop a tailored roadmap to drive AI-powered sales and service transformation driving towards:

- **Improve Pipeline Management with Automation:** Empower your sales workforce with AI-driven insights and tools to streamline processes, reduce manual tasks, and close deals faster.
- **Streamline Customer Service:** Use generative AI and automation to enhance service efficiency, enabling faster issue resolution and improving customer support experiences.
- **Unify Customer Journeys:** Leverage unified data to deliver personalized and contextual customer experiences.
- **Actionable Insights:** Access real-time data and predictive analytics to make informed business decisions.
- **Scale into the Future:** Develop a robust and scalable CRM strategy that not only aligns with your business goals but also ensures your platform is adaptable to evolving needs.

Engagement Deliverables

JourneyTeam will provide the insights, analysis, and recommendations needed to effectively migrate and modernize your CRM system to fully leverage the competitive advantage of AI. You will gain:

- **Business Assessment:** Evaluation of your organization's readiness for CRM migration, including an analysis of current systems and identification of key pain points.
- **Prioritized Scenarios:** A prioritized list of business initiatives with a clear plan to address CRM challenges and improve operational efficiency.
- **Actionable Roadmap:** Development of a project plan with clear timelines and sponsors for each initiative, with recommendations for next steps & boardroom-ready business case.

Connect with JourneyTeam, **Microsoft America's 2024 Partner of the Year** Finalist for Business Applications. We understand the challenges customers face and the benefits they can achieve with Microsoft applications and technologies. Partner with our experienced team to drive your success with Microsoft across Dynamics 365, Microsoft 365, AI and Copilot, Azure, modern data solutions - all leveraging Microsoft's comprehensive security platform. [Contact Us today!](#)