

AIM ASSESSMENT

FOR A MICROSOFT DYNAMICS CRM TO DYNAMICS 365 SALES MIGRATION

An AIM (Accelerate, Innovate and Move) assessment is the first step on your cloud journey to help you understand migration benefits, process, and ROI

OBJECTIVES

An assessment is the first step on your cloud journey, which will help to:

- Understand the Microsoft Dynamics 365 cloud value proposition
- Review business objectives and the Microsoft Dynamics 365 platform benefits
- Define how the upgrade process can be structured with a focus on adopting standards and reducing effort and costs
- Plan for either a more detailed migration analysis or execute your migration project

Click on video image to the right to watch the AIM Assessment overview.



ASSESSMENT WORKSHOP COMPONENTS

A two-day workshop providing a business process overview and assessment of the new capabilities and enhancements against existing features will include:



- **High-level business process review:** Understand your current business processes that are being managed in Microsoft Dynamics CRM and obtain a high-level roadmap of the Dynamics 365 solution overview and One-version management strategy



- **Microsoft Dynamics CRM configuration review:** Get a high level functional review of your Dynamics CRM system



- **Microsoft Dynamics 365 system review:** Get a summary of new Dynamics 365 functionality



- **Customization, ISV and interface assessment:** High level assessment of Microsoft Dynamics CRM customizations and ISV implemented solutions in your current environment. The primary goal of this step is to determine the general workload and business dependencies to migrate existing customizations to a Dynamics 365 solution

HOW IT WORKS

ASSESSMENT

Partner led assessment and two day workshops delivered virtually and/or onsite

APPLICATION

Sales

CONTENT/DELIVERABLES

Upgrade assessment report

- Review state of current solution
- Preliminary run of code through upgrade tool or migration approach for Microsoft Dynamics CRM
- Assessment and joint review of upgrade tool results
- High level estimation ranges for migration project
- Q&A time for your questions around Microsoft Dynamics 365 upgrade methodology

TECHNICAL ASSESSMENT AND TOOLS

Requirements definition: Assist in defining the technical architecture requirements in support of the Sales solution and platform. Get an analysis of existing code and the code that can be migrated to Dynamics 365.

HIGH LEVEL MIGRATION STRATEGY AND PRESENTATION

The **AIM Assessment** offers you cost-effective options to evaluate the move from any version of Microsoft Dynamics CRM to Dynamics 365 Sales. The workshop and migration report includes:

- Upgrade approach recommendations and recommendations of existing customizations
- Review of the Functional Assessment Report, Technical Assessment Report, and Go-forward recommendations with your decision makers



	PRE-WORKSHOP	2-DAY WORKSHOP		
Focus area	<ul style="list-style-type: none"> ▪ Kick off and Business Introduction 	<ul style="list-style-type: none"> ▪ Technical Connect ▪ Technical Assessment 	<ul style="list-style-type: none"> ▪ Functional assessment, presentation of the findings ▪ Upgrade process/ planning/vision/risk 	<ul style="list-style-type: none"> ▪ Finalize and distribute upgrade assessment findings overview presentation ▪ Recommendations and next steps discussion
Customer participants	<ul style="list-style-type: none"> ▪ CRM Owner / IT Manager 	<ul style="list-style-type: none"> ▪ CRM Owner / IT Manager 	<ul style="list-style-type: none"> ▪ CXO, CRM Owner / IT Manager, Business Department Leads 	<ul style="list-style-type: none"> ▪ CRM Owner / IT Manager
Level of Customer engagement	<ul style="list-style-type: none"> ▪ Participate on the Kick off call 	<ul style="list-style-type: none"> ▪ Assist the Partner to access customer environment ▪ Fill in Microsoft Dynamics 365 upgrade questionnaire form 	<ul style="list-style-type: none"> ▪ Assist the Partner to gather information about the business process 	<ul style="list-style-type: none"> ▪ Participate on the final presentation ▪ Provide feedback and share expectations on next steps
Prerequisites	<ul style="list-style-type: none"> ▪ N/A 	<ul style="list-style-type: none"> ▪ Prerequisite files provided by the Partner 	<ul style="list-style-type: none"> ▪ Prerequisite files provided by the Partner 	<ul style="list-style-type: none"> ▪ N/A

AIM ASSESSMENT



ASSESSMENT INITIATION

- Initial meeting with customer on scope
- Share assessment goals
- System access, Model store export
- Initiate migration approach for earlier versions of Dynamics



FUNCTIONAL REVIEW

- Assessment of the new capabilities and enhancements against existing features
- High-level Business Process review
- Recommendation
- Functional Assessment Report



TECHNICAL REVIEW

- Customizations
- Standard over layering
- Code refactoring
- Interfaces
- Report modifications
- Data migration
- Technical Assessment Report



ASSESSMENT SUMMARY

- How to start the migration process
- Customer current deployment analysis
- Recommended best transition approach based on the customers' current solution
- Proposed timeline
- What resources the customer will need
- AIM tools offered
- Benefits of One Version
- Recommendations for a more detailed assessment

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WHY MIGRATE WITH SIKICH

As you embrace your vision for the future, make sure you select a partner that has the experience and expertise to get you where you want to be, and can continue to support you as your objectives evolve. Regardless of which Microsoft Dynamics CRM version you are on, reduce your risk with a partner that's performed dozens of successful Microsoft Dynamics CRM to Dynamics 365 Sales migrations, across industries. You'll start seeing real business results right away through several pre-configured solutions to help accelerate the implementation process. With a team of full-time consultants focused on Dynamics 365, Microsoft Power Platform and Productivity suites, you'll have access to decades of collective experience across our implementation teams. Get the service and expertise needed to make your CRM to Dynamics 365 Sales migration a success, and gain access to continued support for the whole life-cycle of your solution.

To learn more about Sikich, go to www.sikich.com/technology or contact info@sikich.com.

