

SIROCCO

CRM THE RIGHT WAY

Proposal:

Investigation and action plan regarding upgrading from Micosoft 365 CRM from On-Prem to On-Line



A world in transformation

The investigative work aims to map the current situation and the future situation and what needs to be done to both make a "one-to-one" upgrade but also what requirements exist to improve both the operational material flows and processes as well as the application of the functions and features in Dynamics 365 CRM - not least with CoPilot and AI in mind.

The investigation will result in an action plan containing recommendations and a time and project plan to realize an upgrade regarding both strategic and operational measures and plans to improve the company's CRM-related business processes, as well as a roadmap for the realization of the same.

We propose a simple but effective investigation process based on workshops over a period of 4 weeks where together with you, we connect current business strategies, objectives, processes and system support with new or changed working methods and processes with the aim of realizing increased efficiency, productivity and growth based on an upgraded platform, and a well-thought-out change management to achieve the business effects that IF strives for.

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Investigation about transformation from On-prem to On-line

An efficient marketing and sales process is crucial to successfully reach new customers and retain current customers, and not least to reach set business objectives and key results. Therefore, the processes and support systems need to be constantly improved and developed in order to deliver the output that the business expects from the processes.

Sirocco offers a four-week investigation concerning your requirements to convert from the current on-prem CRM solution to the on-line version and the consequences it it will have on everything from the business processes to data models and more. The deliverables by the end of the assignment will be a detailed proposal about a change project and its objectives, a governance model, a working model and a final

roadmap for the migration. Week 1-Documentation and Mapping Week 2 – Analysis and Prerequisites Week 3 – Planning and Prototyping Week 4 - Planning and Proposal Objective Objective Objective Objective Gather all existing documentation and map the current Analyze collected information and prepare the Identify areas for improvement and develop an Finalize proposals and develop a detailed roadmap for I initial draft for a migration plan. CRM system and its ecosystem. foundation for improvement suggestions. the migration. Activities: **Activities** Activities: **Activities:** Compilation and analysis of documentation to Starting a project backlog with identified actions Development of proposals for migration, including Collection of technical documentation (current understand operational value streams and and areas of improvement. CRM system, customizations, logic, codebases, license recommendations. Workshop to create an expectation image and technical prerequisites. Establishment of the project's scope and goals. integrations, other systems). Series of workshops to define the project's scope, identify GAP between current and desired state. Design of a governance model including roles, Compilation of business documentation (process identify pain points, and explore end-users' work Development of a prototype (e.g., PowerPoint) competencies, and areas of responsibility. maps, customer journeys, business processes). to visualize solutions and proposals. Selection of a working model (SAFe, Scrum) methods. Mapping of stakeholders to understand all Evaluation of existing customizations to identify Analysis of risks and dependencies that may affected parties' perspectives and needs. adapted to the project's needs. opportunities to replace them with standard affect the project. Creation of a detailed migration roadmap based solutions. on previous analyses and workshops. Preparing workshops in week 2 and 3: TO-BE and scoping workshops: The Marketing Management Process **Deliverables:** The Leads and Opportunity Processes AS-IS and scoping workshops: The Marketing Management Process Detailed proposals, a governance model, a working The Client information and Due Diligence processes The Marketing Management Process The Leads and Opportunity Processes model, and a final roadmap for the migration. The Reports and Document Management processes The Leads and Opportunity Processes The Client information and Due Diligence The Client information and Due Diligence processes Capacity: 1,5 FTE Deliverables: A complete documentation portfolio and an initial The Reports and Document Management processes . • The Reports and Document Management stakeholder analysis. processes Deliverables Defined project scope, identified pain points, and Capacity: 1,5 FTE **Deliverables:** improved understanding of work methods. A project backlog, a GAP analysis, an initial prototype of the solution, and a risk analysis. Capacity: 1,5 FTE

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Hours, Costs and Agreement

Hours and Cost:

The activities and action plan that Sirocco suggest is based on 1,5 FTE * 4 week * 40 hours = 240 hours

Our hourly rate is SEK 1 100/hour.

Additional costs for travel and stay or other project-related costs will be invoiced.

Agreement:

An agreement to carry out this assignment will be based on this document (Statement of Work) and based on Sirocco's standard terms and conditions.







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Sirocco AB

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