



CRM THE RIGHT WAY

Proposal:
Investigation and
action plan regarding
upgrading
from Microsoft 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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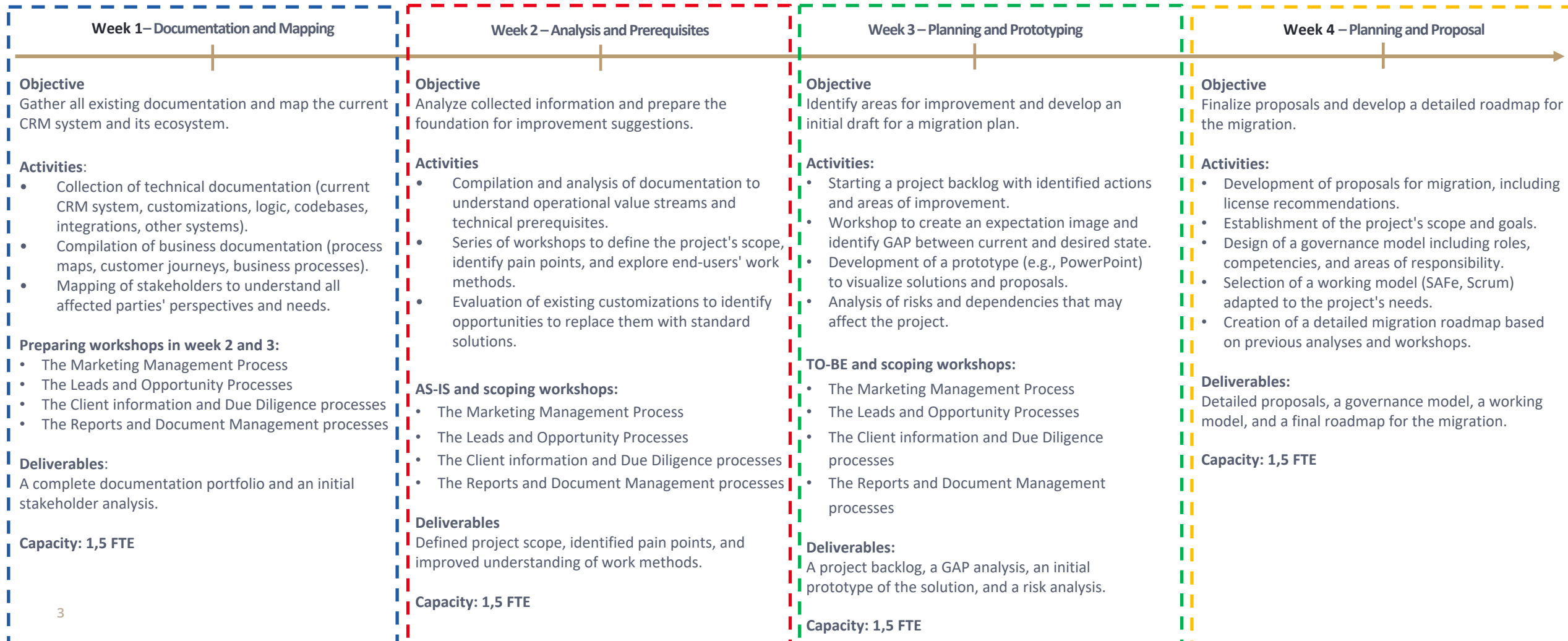
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Investigation about transformation from On-prem to On-line

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 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.





Hours, Costs and Agreement

Hours and Cost:

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

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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