

Microsoft Dynamics 365 Customer Engagement (CRM)

3-Wk Envisioning Assessment



Leverage Synoptek's certified Dynamics 365 CRM experts to identify the next steps for your CRM implementation.

Synoptek's Dynamics 365 Customer Engagement (CRM) assessment involves a thorough evaluation of existing business processes and workflows ensuring that the implementation aligns with the unique needs of the business, resulting in improved efficiency, better customer experience, more accurate data, cost savings, and better alignment with business goals.

Dynamics 365 CRM Assessment Goals:

01 / Define project scope, identify the impact, and set priorities

02 / Clarify management roles in sponsorship

03 / Assess current business operations and scenarios

04 / Identify benchmark statistics to measure the success of implementation

05 / Assemble an in-detailed design and estimate



Dynamics 365 CRM Assessment Agenda:

Business Analysis Session

- Identify key personnel and define success criteria of the implementation project
- Conduct business analysis sessions that includes interviews, observation, and analysis
- Identify gaps that will be documented and rated/ranked for value

Data Migration Session

- Data migration sessions to discuss the value and impact of data migration
- Analysing the overall costs of moving the data like entity records, financial records, inventory, customer information records, and other records to the new system, compared to the value of data migration

Data Integration Session

- Discuss the value and impact of data integration between Microsoft Dynamics 365 CRM and other business systems
- Analyze the costs compared to the value of data integration.

During the Business Process Assessment, Synoptek will also identify and document the impact of this project on your business including cultural impacts, productivity improvements, and risks. Understanding the business impacts allows us to plan for a successful implementation of Microsoft Dynamics 365 CRM. We will also identify additional success criteria at the departments and individual level.

Deliverables:

- Business Process Assessment (BPA) document
- Appropriate business process flows/maps
- Assessment of the impact of Dynamics 365 CRM and associated business management systems
- A high-level strategy for migrating current data to a new system.
- Project plan/cost estimate

