walkerscott

Klevr CRM: 12-Day / 6-Wk Implementation

Klevr CRM is a model-driven Power App built on Dynamics 365 to meet the needs of businesses who want a pre-configured and ready to use solution at an out of the box price and rapid deployment in days. Klevr CRM has been designed to be a single source of truth for sales and account management, integrating CRM & ERP data through the Dataverse (or Common Data Service)

Collaborative: Allows your team to have total visibility over sales and account management activity.

Workflows: Simplifies your business with workflows that trigger instant actions, maintain visibility of activities and drive processes throughout the business.

Reports: Measure results through KPIs and interactive reports and dashboards

Benefits of Klevr CRM:

- Pre-configured and ready to use – Prebuilt workflow and rules to accelerate your adoption.

- Rapid – Days not months to implement

- Extendable – Extend or build your own changes into the workflows and interface to meet your specific requirements.

- Upgrade Path - Future proof technology pathway from an out of the box solution.

The following 6 Stage approach is a simple and efficient pathway to have you operating on Klevr CRM. Our expectation is that the implementation approach will take 6 weeks from start of the Pre-installation walk through.

Stage/Week 1. Pre-installation walk-through & Solution Design

- The walk through will provide the detail of out-of-box Klevr CRM functionality and the approach to getting the system deployed and adopted inside the organization. The workshop will also scope data migration and loading requirements.

Stage/Week 2. Environment Configuration

- Two Microsoft Dynamics 365 environments (Production and Development/Staging) will be activated in a client-controlled tenant. The secure environments are managed through Azure AD and implement a role-based access model.

Stage/Week 3. Installation of Klevr CRM and Configuration

- Walkerscott will install and configure Klevr CRM into both Dynamics 365 Production and Development environments. Users are setup and configured within the Administration panel for both environments.

Stage/Week 4. Data Migration

- Client data from existing systems will be loaded through Excel templates into Dynamics 365. Any in-flight business process status data will be loaded directly into Klevr CRM.

Stage/Week 5. User Training

- Walkerscott will provide a user training workshop for a max. of 3 client users. The training will be completed on-premises or over Teams covering core functions in a single session.

Stage/Week 6. Support

- Walkerscott provides a Hypercare Phase following the go-live of the Klevr CRM solution to ensure adoption and solution fit are achieved. This period runs for a single week post go-live.