Scope your Dynamics 365 Strategy

Caltech IT Limited

www.Caltech.co.uk

George@Caltech.co.uk

Scoping Dynamics 365

- Scoping a Dynamics 365 CRM project is daunting but has clear advantages.
- A thorough ‘requirements and process review’ will identify the business processes within the project scope.
- Carrying out a requirements and process review will generate high value business requirements.
- Understanding the parameters of your project and clearly communicating this project plan, reduces risk.
- Risk of
  - Low return on investment
  - Poor user adoption
  - Directors confidence is a reason why some CRM projects never get signed off.

Understand your Headlines

Caltech CRM
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- Your headlines are what has led you to review your systems. What are these headlines? What is giving the business pain?

Task

- Document the desired outcomes broadly – i.e. reduce time of the sale, reduce administration time by * hours…
- Get the goals agreed at director level
- Once the pains and agreed outcomes are agreed don't lose sight of them. This is the pivotal reason why you are putting the system in place.
- Communicate your company-wide goal for implementing CRM to get buy in and interest.

Cross Functional Solution

- Dynamics 365 is a cross functional solution containing CRM functionality and intelligent business applications in the cloud. Those involved in the scoping exercise need to be involved at every stage. CRM is used by teams across the company and each department needs to take responsibility for their own part of the system.

Task

- Those involved in understanding the headlines, keep them informed.
- Identify the champions of the system for each department.
- Ensure there is a board sponsor at Director level.

Look to the Future

- Decide what you want a business solution to do. You will need to consider your current IT infrastructure, processes, and company-wide key performance indicators. A good solution will fit your evolving needs and can be scaled accordingly.

Task

- Ensure your champions share their processes and KPIs
- Ensure they understand where the processes fail and look at their requirements.

Scoping Assessment

- Assess your requirements in-depth. Detail the scope. Pull together all your organisations requirements from the headlines to the processes.

Task

- Document your scope.
- Generate a requirements and process review report.

Useful Questions

Sales and Development

- How does a prospect contact you to get information about your products and services?
- How do you record and track leads?
- Is there a sales process that everyone follows?
- Do you want to provide quotations to your customers?
- What is currently causing problems in the process?
- What would you like that you haven’t got now to do your jobs more effectively?
- How do you work out on the road?
- How involved do you want CRM to be with social networks?
- What reporting do you need?

Useful Questions

Marketing

- What types of campaigns do you run?
- What is your time spent on mostly currently?
- Do you have the data you need to run targeted campaigns?
- Can you segment data effectively?
- Do you track return on investment of campaigns?
- Do you run events?
- Do you need social media to be more engrained with your CRM solution?
- How joined up are you with sales?
- Do you carry out email marketing? Do you use an ESP?
- How do you manage your suppression list

Useful Questions

Customer Service

- How are cases or complaints logged?
- Are there SLA’s or KPI’s?
- How do these SLA’s flag?
- How are the SLA’s reported on?
- Is there a knowledge base?
- Are there standard letters?
- How does customer care communicate – through which channels?
- Is there an escalation process?
- Do you need scripting or have call scripting in place?
- How do you allocate a service call?

Begin System Research

- Always invite a number of experts in and give them your scope as soon as you can. Ensure you consider how user friendly the system is they work with and the potential and on-going costs. Consider the ongoing development of the product and what its limitations are.

Task

- Make sure your headlines are at the forefront of the product.
- Can you work with the system and vendor?
- Understand the product fully get a free trial.

Diagnostic

- Commission a vendor to supply a diagnostic document. This will cover main areas to be considered to fit your processes and your headlines. This will cover functional areas, current data, documentation, new data, reporting, how you will manage the data and processes, new behaviours to support best practise and integration with existing systems.

Task

- You will usually pay for a diagnostic document. It will give you clear, high value outcomes of the system capability, outline budgets and analyse the scope.
- Our diagnostic gives you a view of what the system must do, what it should have, what it could have and what it won't do.
- Ensure the champions are involved in the diagnostic meeting and someone from each role in the business.
- This document gives you a fixed price for Dynamics 365 implementation as well as clarity of what will be delivered.

Finally

- Your Dynamics 365 CRM implementation is now in safe hands.
- Your headlines are at the centre of your requirements and outcomes of the system.
- The risk of implementation is minimised.
- **And Beware** : of vendors missing out crucial stages – it will only mean pain further down the line or a system that just doesn't meet your expectations or objectives.

About Caltech IT Limited

Caltech CRM
Proven Competitive Advantage

Our Approach

WE DO CRM & WE DO IT WELL

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