

HIGH EXPECTATIONS FOR YOUR BOTTOM LINE

We implement only what you need now, but ensure we build your system for your business's future growth. This saves you valuable time and money.

Depending on where you are in your CRM journey - getting out of excel and needing a system, expanding your current system, in need of an audit of your existing system (to determine growth capabilities or to review a failed implementation) we have the experience to help.

Our successful agile methodology focuses on your business outcomes and will have your CRM solution up and running fast. Let us discuss your needs, understand your concerns and find a phased approach to help your team hit the ground running. Our fixed fee engagements help you with your budget and ensure a timely deployment. Your involvement throughout the project will ensure you can support your system moving forward.

1 Understanding Your Business Outcomes

First, we conduct a business needs review. We will gather the details of your business to understand your pain points and sales needs. Over one or several meetings with your stakeholders we will:

- Learn everything about your current process and CRM system.
- Speak with you about what's working and what's not.
- Discuss how a CRM solution could make your processes more efficient.

When the review is complete, we will pull together a scope of work and work with you to determine the best next steps for your business success.

2 Deploy

From there, we'll integrate Dynamics 365 using an iterative development cycle. An iterative approach means we're setting and meeting deadlines weekly to review and incorporate your feedback into the system configuration changes. By meeting weekly we will ensure that there will be no surprises at the end of the project build.

Our team will ensure that your system works for your business in order to address your defined business outcomes.□



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3 Testing & Training

After configuring your Dynamics 365 system, we will conduct an end to end system review. We will capture any final changes during this session, and make any necessary changes. This should be a minimal list due to the involvement of the core project team throughout the implementation. Once the final punch list is complete, and final testing is complete, the system will be Ready for Training. Before go-live, we'll conduct training for your organization or you may choose to train your team along with our guidance.

4 Launch & Ongoing Support

Our key goal is for you to have 100% User Adoption of your CRM system. User Adoption is a prerequisite for success, but also can frequently be met with obstacles. After your system goes live, we have several support plan options that we can implement to address your specific needs. Support would include but is not limited to, resolving issues related to the deployed functionality of your Dynamics 365 system and additional training.

