

Microsoft Dynamics CRM Healthcheck

Microsoft Dynamics CRM is mission critical to the success of your organisation. Naturally, you want to ensure your organisation realises the highest value from its technology investment, both now and into the future.

Over time, organisations are faced with a seemingly endless source of change – new customer demands, new products, new competition, new shareholder objectives, organisational restructuring, mergers, acquisitions and new legislation. As these changes accumulate, your applications and business processes – initially configured according to past requirements – may no longer be aligned to your current and future needs. Derive the highest level of business benefits and maximum return from your Dynamics CRM investment by ensuring your applications and processes evolve with changes in the marketplace.



SERVICE CAPABILITIES INCLUDE:

- Application Configuration Assessment & Recommendations for Modifications
- Change Management Recommendations
- User Training Recommendations
- Recommended Technology Assessment Areas

IMGROUP CRM Healthcheck

IMGROUP can help you make the most of your optimisation efforts by providing a realistic assessment of the current state of your solution. Utilising our product and business expertise, our specialised Dynamics CRM Healthcheck service evaluates the major functional areas of your solution and business processes. It pays particular attention to gaps between your current and future needs, as well as how effectively you are using the system today. We have a proven three step methodology:

Scope Definition: To ensure the most cost effective information gathering efforts, we work with you upfront to determine which applications and business processes need to be reviewed during the assessment. You choose the processes on which you would like the CRM Healthcheck performed. Our team will validate your resource requirements, IMGROUP resource requirements, duration and cost to deliver the Healthcheck.

Questionnaire-led interviews: Based on the defined scope, we will tailor pre-built proprietary questionnaires to delve into the chosen processes in more detail. These questionnaires will gather information on the following aspects – **business process flow, data volumes, application configuration set up, interfaces, security, reporting, customisations and end user training**. We use the questionnaires to guide interviews with your key users, managers and technical staff. Our team will compile and analyse the results to garner important details about your current organisation and business processes. Interview observations about your system and processes provide the low-level input needed to build effective recommendations.

CRM Healthcheck Report: Based on the information gathered, IMGROUP will produce a Healthcheck Report. This report details our findings, including current challenges, gaps and current configurations that may prevent you from realising the full potential of your Dynamics CRM solution. We will identify high impact areas and provide recommendations to effectively address applications and business process modifications. The assessment and recommendations will help you cost-effectively unlock greater value from your CRM solution.

Microsoft
GOLD CERTIFIED
Partner

 Microsoft Dynamics

IMGROUP
INFORMATION MANAGEMENT GROUP

IMGROUP DIFFERENTIATORS

- Extensive Microsoft Dynamics CRM expertise using standardised methodology, process, tools and resources.
- Breadth of Services to integrate functional, technical and change management services necessary for optimal user adoption.
- Aligns your goals with a cost-effective and comprehensive implementation solution resulting in project success.

Service Benefits

The IMGROUP CRM Healthcheck can help your organisation

- **Identify your most pressing issues** - identify high value targets and provide associated recommendations designed to provide the most benefit.
- **Increase cost savings** - improve application and process productivity to enhance the return on your investment.
- **Leverage new functionality** - provide awareness of the new software capabilities that can improve efficiency, fit and value of your solution.
- **Quickly adapt to change** - optimise your solution to maximise software use for future business changes.

Your organisation will need to identify and engage key resources that have intimate familiarity and knowledge regarding the business process, configuration, reporting, and end user utilisation of the Dynamics CRM applications. We will provide an agenda that will detail the logistics for their participation.

Getting Started

Leverage IMGROUP's methods, tools and extensive experience with customer implementations across diverse industries. To find out more or to book a CRM Healthcheck, please email our CRM Sales team at CRMSales@imgroup.com.

About IMGROUP

Information Management Group (IMGROUP) provides strategies, services and solutions that help our clients optimise their business processes and improve performance.

Our deep understanding of technologies is balanced by extensive business and process expertise with a comprehensive implementation method to consistently deliver world-class solutions with real business value.

We have solved complex performance management problems and delivered business applications in some of the most complex business scenarios across industry sectors. Our innovation and ability to deliver consistently has been recognised by Microsoft who awarded us the Global Partner of the Year in Business Intelligence Solutions for four years in row 2005, 2006, 2007 and 2008. Our clients include some of the largest organisations across industry sectors including Finance, FMCG, Retail, Petrochemicals, Media, Broadcasting, Insurance, Transport, Services Pharmaceuticals, Local and Central Government.



Contact

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