

Microsoft Dynamics 365 HealthCheck



Designed to provide guidance and recommendations on maximizing your Microsoft Dynamics 365 Investment

Utilize best practices and receive expert advice

In many cases, organizations spend inadequate time on ongoing education—especially as new versions with new features are released—resulting in less than optimal usage of the tool.

Save time and money

Investing in a CRM application is a significant decision. Investing in a CRM application that is not being utilized optimally for your organization is a loss in opportunity cost—a cost equating to lost dollars as well as employee productivity and customer satisfaction.

CRM initiatives have a 63% fail rate, according to a 2013 study by Merkle Group, Inc. Since surveys support the reality that most high-growth organizations today view CRM as a key driver to their company's success, how do these organizations achieve the results desired?

PSC Group's Dynamics 365 HealthCheck service helps your organization identify any factors limiting the success of your system. Our analysis assesses the issues specific to your organization's deployment of Dynamics 365 and identifies the opportunities available to realize the desired benefits from the system.

Our goal, by highlighting these "gaps" and offering suggestions for closing them, is to help you take your Dynamics 365 implementation to its desired state—driving user adoption, optimizing business processes, and ultimately increasing value and satisfaction.

Here are some questions that our Microsoft Dynamics 365 HealthCheck will address...

- Is CRM adoption meeting expectations?
- Is CRM being used the way it was originally meant to be?
- What is the quality of the data in CRM?
- Is your organization's system technically architected properly?
- Is your organization experiencing system performance issues?
- How well are you positioned to upgrade to the next version?
- Are users trained properly?
- Are there CRM best practices your organization is not aware of?
- Are you purchasing the right type of licenses on the right program?
- Does management have the visibility into sales and marketing that they want?



It's all in the way we listen.®

Founded in 1990, PSC Group, LLC is a business technology consulting firm focused on enabling strategic technology driven tools, processes and objectives that help companies improve and grow their value. Our process begins in the way we listen and ends with our clients experiencing a greater return on their technology investment. With offices in Chicago and Kansas City, PSC has a proud history with our clientele that is based on mutual respect, integrity and honesty. To find out more, please visit us at: www.psclisten.com.

For more information about consulting and support solutions from PSC Group, please contact us at microsoftynamics@psclisten.com.

Important Note:

The defined deliverables for the HealthCheck engagement are representative of the primary service offering. PSC will tailor the services based on your unique business requirements.

Engagement Components

» User Acceptance and Adoption Analysis

Designed to identify whether gaps exist in your intended application usage and adoption, and to provide recommendations for corrective action that you can take to expand the adoption of the application

» Upgrade Readiness & Risk Assessment

Provides you with the appropriate information to allow your team to proactively plan for the upgrade of your Dynamics 365 environment by identifying any problem areas that could negatively affect the upgrade process

» Data Quality Assessment

This will establish whether the current application data and administrative data management procedures are meeting the goals of the product—and provide recommendations to eliminate existing issues such as duplication and low integrity.

» License and Storage Cost Analysis

This analysis will help determine whether you're:

- Paying for unneeded licenses
- Using the right user license for the role
- Managing storage effectively to minimize cost

Typical Deliverables

- **Scorecard**
Includes analysis and assessment documents as well as summarizes findings in a dashboard representing how your implementation compares to other similar organizations.
- **Quick Wins**
Identification of easy to implement system improvements
- **Roadmap**
High level recommendation plan of how to optimize the environment short and long-term