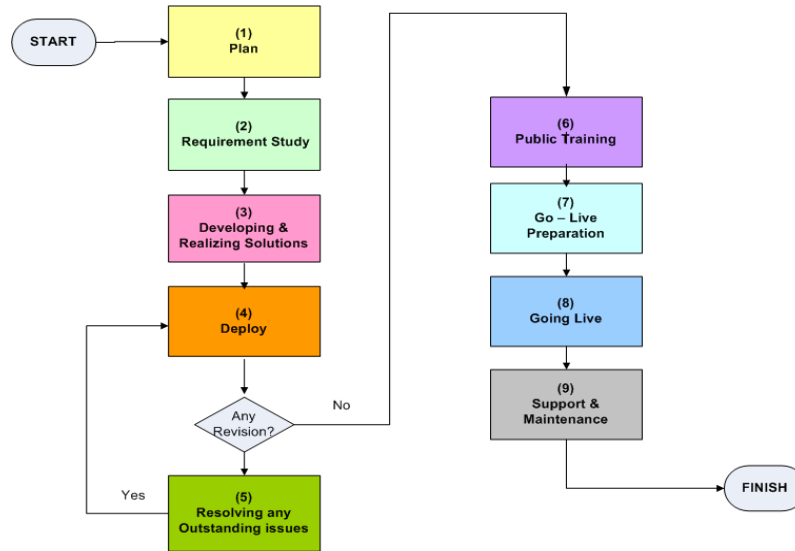


DynamicsSavings CRM Remote Implementation Methodology



No	Tasks	Description	Template 1	Template 2
1	Plan			
	Plan Pre-Engagement with the Customer	To transfer knowledge of the Customer from the Sales Resource and contact the customer to set the proper expectations for the engagement.	Implementation Process Stages.xls	
	Review documentation from Sales	To transfer the information gathered in the sales cycle to become familiar with customer's CRM requirements and technical infrastructure.		
	Conduct initial alignment meeting with the customer	Determine Kick off dates, define customer project team, discuss resource requirements, define critical success factors and key metrics, determine project objectives and drivers, determine project constraints, identify project risks, define project assumptions.	Engagement Plan	
	Prepare Engagement Plan	To complete an appropriate engagement plan		
	Prepare Customer Questionnaire	Obtain the right customer questionnaire to be used in the next phase	Customer Questionnaire	
	Prepare Project Plan	To prepare a task breakdown structure	ProjectPlanSample CRM.xls	
	Deliver Pre-Engagement document to Customer	Deliver preengagement documents such as Questionnaire, Engagement Plan		
	Conduct final alignment meeting with the Customer	Review the deliverables, Plan and Agree on milestones and dates.		
	Plan Pre-Engagement with the internal team	Identify resources and resource readiness, plan internal kick off meeting.		
2	Requirement Study			
	Review infrastructure	Review Current infrastructure, Compare current infrastructure to MSCRM, Identify and document Gaps	Infrastructure document	
	Review and document current business process	Collect requirements, process of each modules Collect required reports template Collect list of special information need to be maintained in master data Survey for roles and responsibilities related to each modules	Customer Questionnaire	Business Process Report
	Review and document legacy data conversion	To review customers legacy system(s) and document data conversion approach	Legacy data mapping	
	Determining User Interface processing requirements	To define all user interface modifications as well as workflow associated with it.	UI Requirements document	
	Determine Organization structure and security model	To define the organization structure, users, roles and the security model.	Organization Configuration	
	Review and document Integration Requirements	To analyze and document at a high level, any requirements for integration data to and from other system(s).	Interface document	
	Define Training Scope	Identify Users to be trained, Consultants Role and providing documentation. The details of Training Requirements will be captured in Implementation Solution Detail Document.		
	Define User Acceptance Testing Scope	To define the User Acceptance Testing that the Customer Require for implementation. User Acceptance Criteria will be documented in Implementation Solution Detail Document.		
	Business Mapping and Gap Analysis	Standardize Business Procedures Prepare List of Gaps between Standard System & Customer's Requirements Propose List of Process Changes Prepare Customization List and Design	Customer questionnaire filled	Workflow definition
	Develop Conceptual Design Work Product	Prepare Prototype	Implementation Solution Design	
	Presentation of Proposed System			
3	Developing & Realizing Solutions			
	Develop Customization	Develop the required customizations		
	QA/Testing Customization	Testing the customizations and reconfirmed according to customer requirements		
	Prepare User Acceptance Test Scenarios	Prepare test cases for User Acceptance Testing		
	Develop Training Materials	Develop training PowerPoint, materials and exercises for users		
	Import Sample Master Files for Testing Purpose			
	System-wide Test & Verification	Perform entire system test and verification against the business requirements		
4	Deploy			
	Installation to Testing Server			
	User Acceptance Testing	Together with users, perform the test cases defined by users and check the system output according to the expected results		
	Update System and Materials	Update customizations, documentations and training materials according to the results of CRP, prepare the new build for public training		
5	Resolving Outstanding Issues			
	Work with key users to resolve known issues	Solve any issues discovered so far		
6	Public Training			
	Provide Public Training to End Users	Key Users training for end-users according to the business processes defined for their departments		
7	Go Live Preparation			
	Install System at Production Server			
	Develop Starting Data Import	Prepare mechanism to import the initial data from old system		
	Prepare Starting and Master Data	Import master data as well as the beginning balance of each modules		
	Final Update Systems and Documents	Final fine-tuning on customizations, update documentations and training materials if there is any changes		
8	Go Live			
	Bring system to live, Parallel run for selected models	Parallel run new system with old system (if any)		
	Cut off Old System, Run solo with new system			
9	Support and Maintenance			
	Closing, System Assessment, Sign Off	Assist users in closing each modules, generate closing reports for all departments		
	Support on-site for all modules	On-site support consultants to assist users (if requested by customers)		