

The goal of the Endeavour CRM Health Check is to **build a roadmap** that identifies: gaps that need to be addressed, future updates that may impact configuration, and opportunities for change and innovation. Our goal is to help you maximize the return on your CRM and business application investments.

### **Four pillars of an Endeavour CRM Health Check:**

1. Technical review
2. Process / Feature review
3. End-user adoption review
4. Upcoming updates review

**Key sections with your CRM Health Check findings document will include recommendations based on your needs. Based on scope, potential sections may include:**

- CRM Strategy
- CRM Processes, Features, and Upcoming Updates
- CRM Training & Change Management
- CRM Licensing and Tenant Configuration
- CRM Integrations
- CRM Modules and Add-ons
- Advanced Field Service and Project Service Automation
- Marketing Automation
- CRM Roadmap

