

Velosio[®]



CRM Assessment



Solution Details

Which Apps

D365 for Marketing, Sales, Customer Service, Field Service, and Project Operations

Industries

Horizontal solution that can be deployed for any industry

Price

\$11,000 (services only)
1 week

Solution Details

Description

Unlock the real value of your CRM investment by aligning to business outcomes.

Scope Includes:

Review existing business process

Review the existing CRM solution (functional and technical)

Provide recommendations for a path forward through quick wins

Screenshot



Day 1 Activity	Day 2 Activity	Day 3 Activity	Day 4 Activity	Day 5 Activity
<ul style="list-style-type: none"> • Mobile the team • Client demos existing CRM deployment • Review business process 	<ul style="list-style-type: none"> • Hold interviews with the various stakeholders (challenges vs. outcomes) 	<ul style="list-style-type: none"> • Perform functional review • Perform technical review 	<ul style="list-style-type: none"> • Build Assessment Document that contains the recommendations 	<ul style="list-style-type: none"> • Hold a meeting with all the key stakeholder to review our findings and observations, recommendations, and next steps (path forward)