



MICROSOFT DYNAMICS CRM RAPID IMPLEMENTATION.

Thank you for your interest in Idea's Dynamics CRM Rapid Implementation solution, that allows your company to get up and running with one of the World's most popular CRM solutions in a short amount of time. A rapid implementation can benefit your company by quickly getting sales, marketing and service areas up to speed with a familiar and easy to use solution. In addition, the rapid implementation can be leveraged as the foundation for future expansion via integration with other systems, customizations to fit your specific requirements, and workflows to provide automation around certain business processes.

Below are some frequently asked questions around a Dynamics CRM rapid implementation from Idea. Please feel free to call our Dynamics CRM team directly at 713-830-5830 with any additional questions.

Does our Microsoft Dynamics CRM implementation fit the "rapid" implementation criteria?

A rapid implementation is an implementation that is done in a short period of time (usually 1-3 weeks). The rapid implementation is not for all organizations, but will work in several instances:

- The organization wants to implement the solution, and learn how to use a customer relationship management (CRM) solution, but has no past history of a CRM solution. They want to learn to use the application out of the box and to organize their sales and/or service department according to the way the application works best.
- The organization wants to run a pilot implementation before getting into a larger, customized solution. They want to start with minimal users and minimal customizations to learn how to use the application and to ensure that future customizations are appropriate. In this context, the customer is using the rapid implementation as a way to verify that the solution is appropriate for the organization, and to prove to stakeholders that a significant investment in the solution is a worthy one.

What are the limitations?

In addition to the criteria mentioned above, there are limitations to completing a successful Dynamics CRM rapid implementation. The basic characteristics that distinguish a rapid implementation include:

- Minimal customization of the product
- No integration to third-party applications
- No source data cleansing or data conversion
- Involves training between 5-10 users with similar roles in the system

Any of these limitations can be implemented once the rapid implementation is complete.

What should we expect in a Dynamics CRM rapid implementation?

In a rapid implementation, you should expect:

- The engagement manager and the management team will discuss the key success factors for the implementation and your organization's critical business needs. The implementation should meet these needs or the engagement manager should explain why the rapid approach will not encompass these.
- A high-level review of your organization's current business processes will be done and mapped to the solution. Your managers will then understand how their processes will function using Microsoft Dynamics CRM and what changes, if any, may need to be made to existing processes for an "out-of-the-box" solution.
- The application will be installed.
- The organization will be set up in the solution (users and business units at a minimum).
- The best process to discover and manually convert source data, if applicable, will be determined (data entry, data conversion, and/or data import is not included in a rapid implementation).
- Minimal customization changes will be completed (simple customizations to up to four existing entities is included; no scripting or development is included).
- End-user training will be delivered (based on train the trainer delivery up to 10 users in two three hour (remote) training sessions).

What do non-IT managers need to provide?

Sales and service managers need to provide the following to help the implementation proceed smoothly and to be completed in the time-frame allotted:

- An organization chart that includes the users who will be involved.
- Access to servers and workstations.
- A project sponsor in each department. (This person is responsible for the acceptance of deliverables.)

In addition, sales and service managers must make sure that the employees in their departments who will be users of the Microsoft Dynamics CRM system are involved in the discussions about business process and any customizations that need to be made. These users also need to participate in training.