

Microsoft Dynamics 365 Customer Engagement CRM Optimisation Review

As the platform continues to evolve, and with updates being released by Microsoft on a biannual basis, Xpedition offer qualifying organisations a free-of-charge CRM Optimisation review. For our supported customers, this is provided on a regular, bi-annual basis, along with guidance on relevant elements of the Microsoft roadmap.

The Xpedition CRM Optimisation service is designed to not only assess if your system is optimised to support your organisation today, but also to identify whether any planned updates will impact your CRM system moving forward.

We want to offer you peace of mind by providing a thorough review of your system. Should any issues be identified, we will flag them and work with you to put together a plan to proactively address them. And whilst doing so, we will also highlight any opportunities where an update will help you to get more from your CRM investment.

Your CRM Optimisation review comprises:

- A remote half-day technical review by a Microsoft Certified consultant.
- Optional survey on users, usage and licences – this helps us to advise you on how to make the most of your licences and any licence issues.

Your CRM Optimisation report covers:

- Issues: Problems with your CRM that need to be addressed, which could include unsupported configuration and customisations, reliance on deprecated functionality, licence non-compliance.
- Risks: Areas which could develop into more serious problems, such as sub-standard configuration, data quality or security set-up.
- Improvements: How you can get more out of your CRM system, through best practice and/or by using capabilities that you are not currently taking advantage of. This includes opportunities to utilise new features and functionality from recent and forthcoming upgrades.
- Recommendations: Where possible, we will provide costed recommendations for addressing issues, risks and improvements found during the CRM Optimisation review.
- Next step actions: This could include arranging a more detailed on-site review and/or meeting to discuss our findings and provide guidance on the options open to you.

Get in touch to book a demo – email info@xpedition.co.uk