



ANS Dynamics Check

Purpose of the Dynamics Check

Assessment Objectives

Evaluate organisational use of Dynamics 365 to identify strengths, gaps, and improvement opportunities.

Benchmarking and Best Practices

Compare current maturity levels against industry standards to prioritise transformational initiatives.

Driving Business Transformation

Enable data-driven, strategic improvements to maximise Dynamics 365 investment and optimise operations.





Return On Investment

We discuss your original CRM strategy, understanding what Leadership, Business & IT involvement there was, what defined Business Outcomes were targeted and what the desired return on investment for CRM was.



Operating Model

We review the operating model around your D365 implementation, understanding how the D365 solution is managed and supported, how training is delivered and how change management is handled.



Platform Assessment

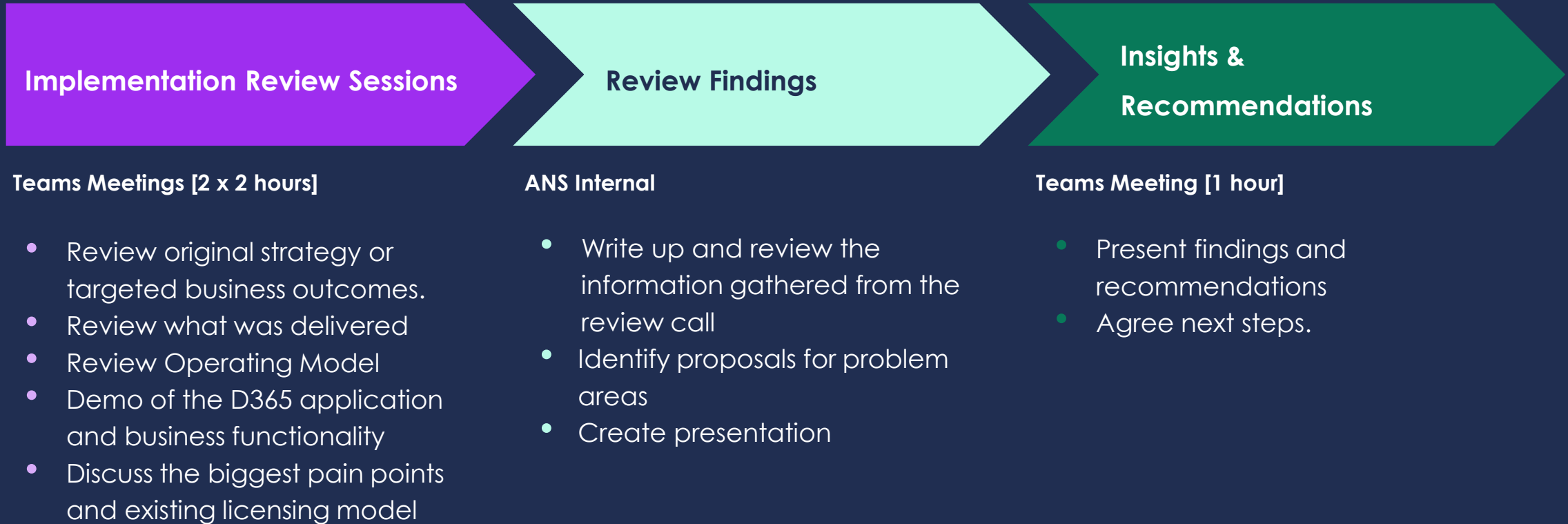
We review your D365 architecture to understand how the delivery has aligned to business outcomes, alignment to best practice, functional suitability, the level of configuration to out of the box capability and licensing.



Efficiency

We review pain points and understand where improvements can be made, licensing best utilised and efficiencies gained.

Dynamics Check Process



Assessment Dimensions

Core Dimensions Explained

Data & Security

Focuses on data model design, quality, and compliance with security standards to ensure safe and reliable data management.

Process Automation

Evaluates the sophistication of workflows, business rules, and AI-driven automation enhancing operational efficiency.

User Adoption & Training

Assesses onboarding, training programs, and adoption metrics to improve user engagement and proficiency.

Integration & Connectivity

Reviews connectivity with ERP, Power Platform, and external applications for seamless system integration.

Reporting & Insights

Evaluates dashboards, KPIs, and analytics capabilities to provide actionable business insights.

Governance & Change Management

Considers ALM practices, documentation standards, and Center of Excellence for effective governance.

Maturity Assessment

Maturity Assessment

Level 100: Started (Disconnected)

Ad-hoc usage with minimal governance and limited functionality marks the initial maturity stage.

Level 200: Managed (Installed)

Basic security and some automation exist, but formal governance is still lacking.

Level 300: Defined (Adopted)

Structured governance, documented processes, and KPI-driven reporting become standard.

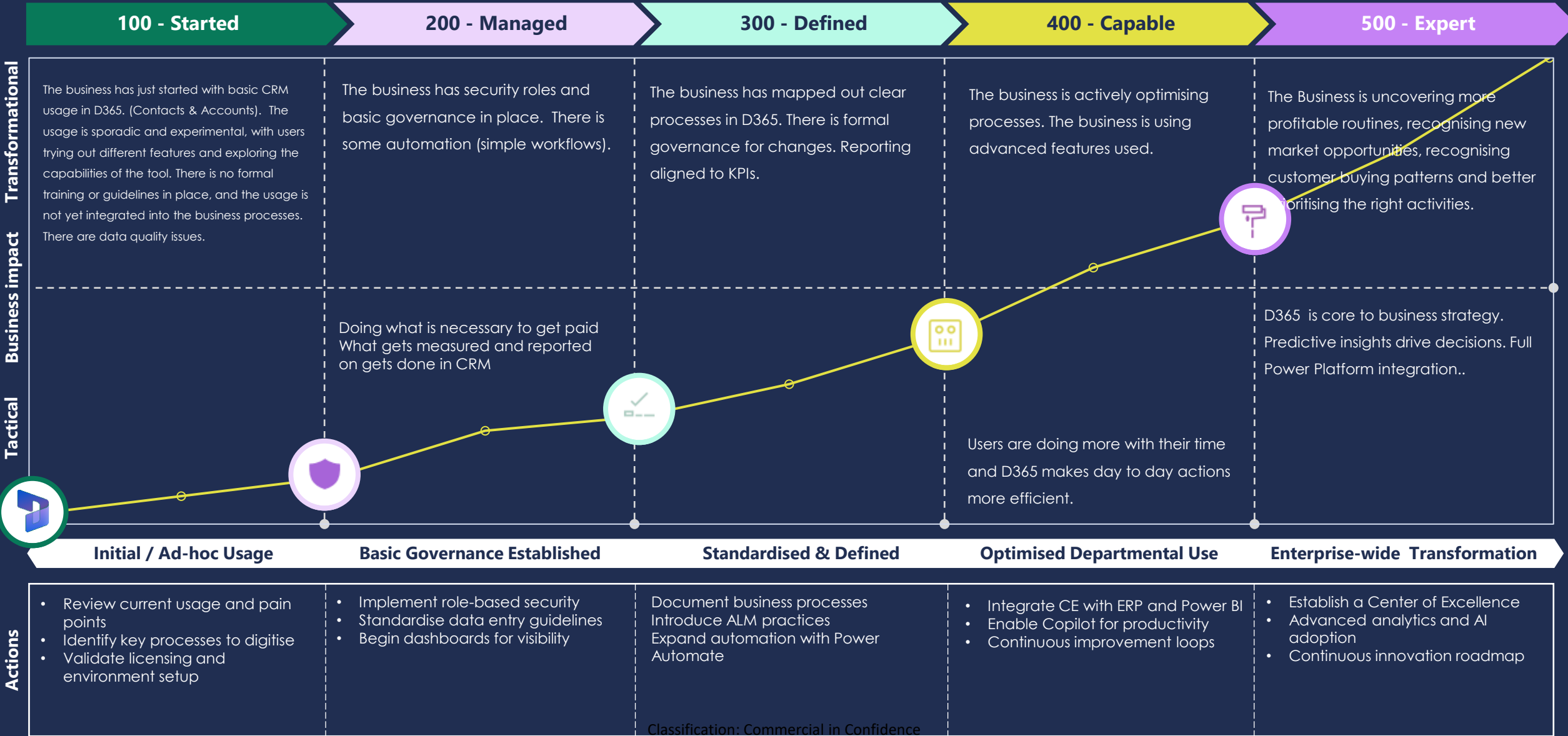
Level 400: Capable (Productive)

Departmental optimisation with advanced automation and early AI integration boosts productivity.

Level 500: Expert (CRM Ready)

Enterprise-wide transformation with predictive insights and full system integration drives growth.

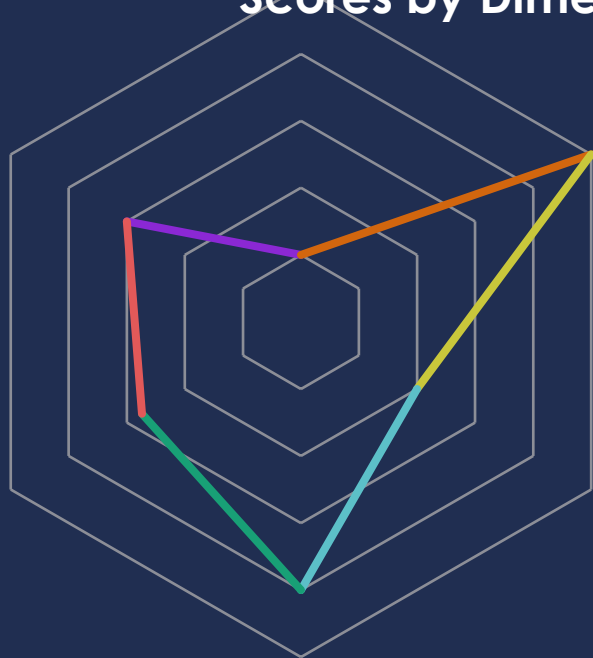
Maturity Assessment



Findings & Recommendations

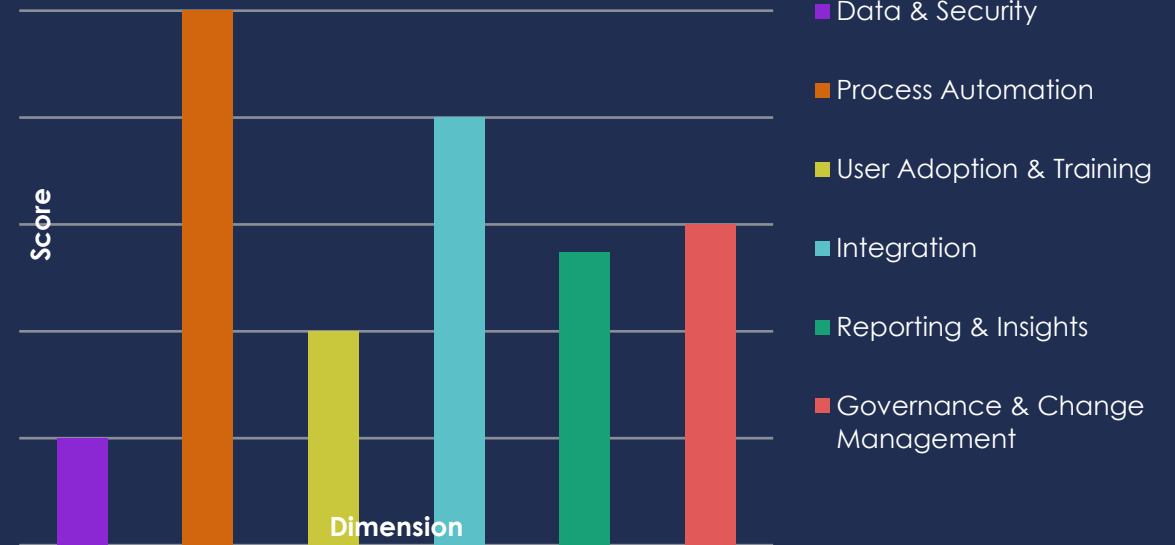
Scores

Scores by Dimension



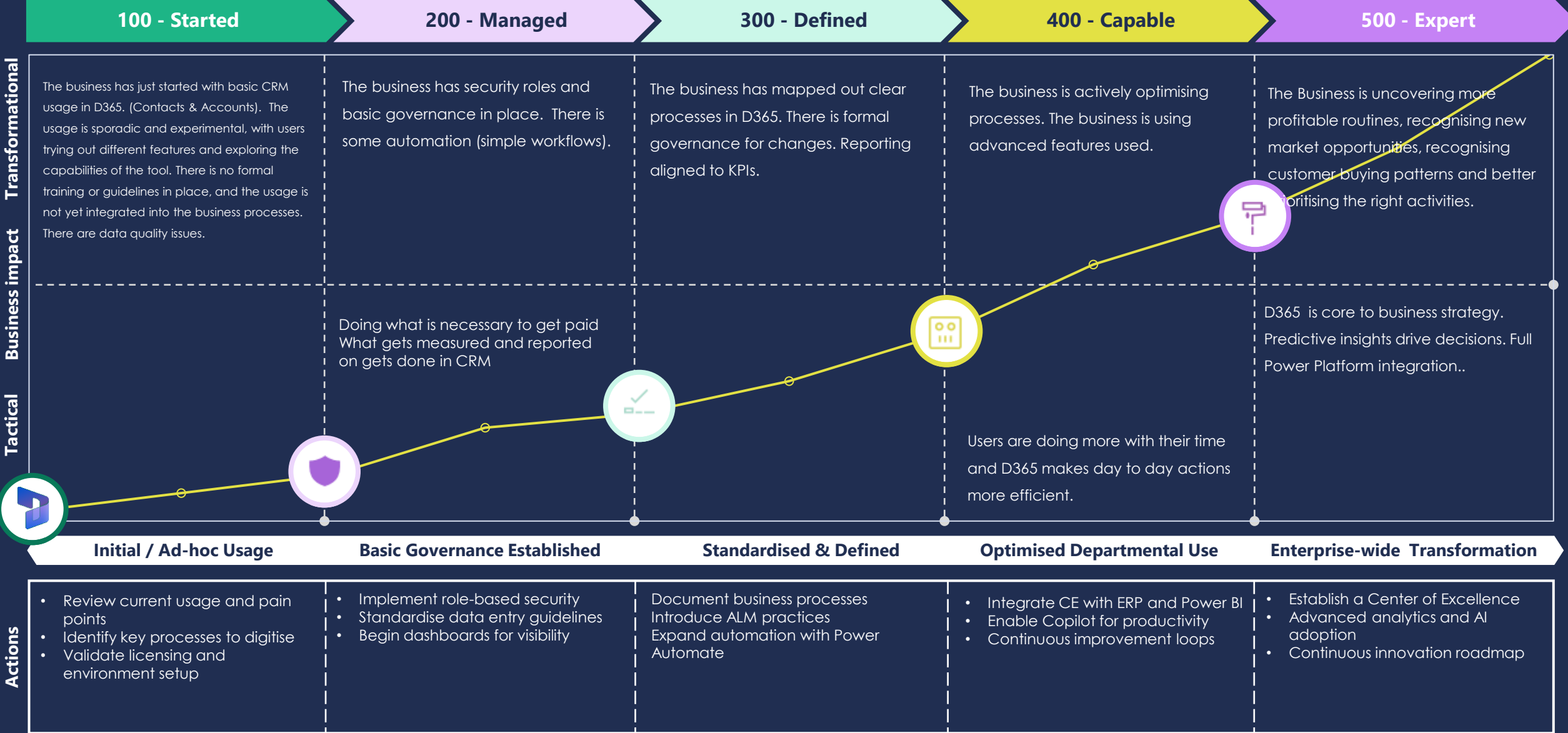
- Data & Security
- Process Automation
- User Adoption & Training
- Integration
- Reporting & Insights
- Governance & Change Management

Average Scores per Dimension



- Data & Security
- Process Automation
- User Adoption & Training
- Integration
- Reporting & Insights
- Governance & Change Management

Maturity Assessment



Recommendations



Score

Addressing Low Scoring Areas

Recommendations focus on specific gaps in low-scoring dimensions to improve overall performance efficiently.

Score

Governance and Change Management Actions

Actions include implementing ALM practices, establishing Centers of Excellence, and enforcing documentation.

Score

Data and Security Enhancements

Initiatives may improve data quality, implement duplicate detection, and strengthen compliance controls.

Score

Tailored and Prioritised Recommendations

Recommendations are customised to organisational context and maturity, aligning with strategic objectives.



Thank you!