

Dynamics 365 / CRM Implementation Project: Pre-Diagnostic Questionnaire

The information below forms the basis of the Diagnostic Meeting

1 Customer Background

- 1.1 Please describe your company structure and show which Key personnel are responsible for each area
- 1.2 What are the main activities of your organisation? *What kinds of products and / or services do you provide?*
- 1.3 Who are the main types of customers / service recipients of your business?
- 1.4 How does your organisation interact with its customers / service recipients? *e.g. telephone, mail, email, call centre, marketing campaigns, field staff, website self-service etc.*

2 Project Background

- 2.1 Please describe the reasons for the proposed Dynamics 365 project, its main requirements and aims, and any business benefits that are anticipated.
- 2.2 Has a shared vision of system requirements been developed among all stakeholders? *Are all stakeholders in agreement on the detail of the requirements? Please describe any areas of uncertainty or disagreement yet to be resolved.*
- 2.3 Has a customer-side project team and project team leader been selected? *Please list customer project team members and roles if known. The project team should be fully*

representative of stakeholders from all relevant business areas and levels, and have sufficient time available for project tasks.

- 2.4 Is there a target date for completion of the proposed project?
- 2.5 Have additional objectives / future requirements to be pursued following completion of the currently proposed project already been identified? If so, please describe these and indicate the intended timeframe. *e.g. further projects to roll-out the solution to other areas of the organisation.*

3 I.T. Environment

- 3.1 **Servers:** Are the Dynamics 365 and SQL servers to be installed on-premises or cloud based?
Cloud based
 - 3.1.1 If the servers are to be cloud-based, please confirm the service provider, if known.
 - 3.1.2 If the servers are on-premises, please comment on their specification. *e.g. physical or virtual? Available CPU, RAM and hard drive capacity., Operating System / SQL version installed? etc.*
- 3.2 **Client PCs:** Please provide a summary of the specifications of client PCs used to access CRM, commenting specifically on CPUs, RAM and the version(s) of Operating Systems, Browsers, Outlook and Microsoft Office that are currently in use.
 - 3.2.1 What other applications are typically in use on client PCs?
 - 3.2.2 Are there any plans to upgrade client PC hardware or software in the near future? If so, please elaborate.

- 3.3 **Mobile Clients:** Will any mobile devices be used to access CRM? If so, please confirm type, operating system and browsers to be used if known. *e.g. iPad, Android smartphone, Windows tablet, Internet Explorer etc.*
- 3.4 **System Access:** What methods will be utilised by users when accessing Dynamics 365? *e.g. IFD, LAN or WAN, via VPN, Terminal Services, Citrix etc., via connected or disconnected clients.*
- 3.5 **Other Information Management Systems:** What other information management systems are currently in place? Please give a brief description of the purpose and usage of each system. *e.g. Other database systems, Accounts Systems, ESP solutions, Excel spread sheets, ERP systems, etc.*
- 3.6 Who manages the I.T. environment? *e.g. internal team or external supplier?*
- 3.7 What I.T. management policies or protocols are currently in place?

4 Data Issues

- 4.1 **Data Sources:** Where is the data to be imported into Dynamics 365 currently held? *e.g. other CRM system or databases, Excel spread sheets, Outlook, paper systems etc.*
- 4.2 **Data Preparation:** Will the data to be imported into CRM require cleansing / de-duplicating? If so, how and when is this to be accomplished?
- 4.3 **Data Ownership:** Who is responsible for data management within your organisation?
- 4.4 **System Integrations:** Are any other information management systems to be integrated with Dynamics 365 as part of the proposed project? If so, please indicate which, and explain the proposed nature of their integration with 365.
- 4.5 **Data Migrations:** Is data from any other information management systems or sources to be permanently migrated or merged into CRM as part of this project? If so, please describe the function of the systems involved and explain the data preparation that will be required.

5 Dynamics CRM – Additional Information

- 5.1 How many users will have access to Dynamics 365?
- 5.2 Which departments, teams or job functions will use the system? *Please provide details, including the number of users in each category.*
- 5.3 What will they use the system for? *Please comment on each group of users individually.*
- 5.4 Are the users aware of the proposed project, and have they “bought-in” to the potential benefits that Dynamics 365 will give them?
- 5.5 Will Dynamics 365 support any specific business processes? *If so, please describe them, and confirm whether they are currently in use, and whether they have been documented.*
- 5.6 Will any measures to control user access to data be required within your Dynamics 365 system? *e.g. user permissions, security roles, business units, teams, regions, management of record ownership etc.*
- 5.7 Have any specific reporting or management information requirements already been identified? *If so, please list them here, giving a brief description of each.*
- 5.8 Will the proposed project result in any changes in the use of other management information systems? If so, please describe these changes. *e.g. functionality to be superseded by 365 and data migrated to 365, system to be integrated with 365, system to be retained as a standalone system etc.*

Any other information that you feel is relevant and needs to be discussed at the Diagnostic Meeting.