

Dynamics 365 Customer Engagement Assessment



Assessment Program

Duration: 3 Days [Remote]

Difficulty Level: 200 - Intermediate

Description

Gain valuable insight into the health of your Dynamics 365 Customer Engagement instance by proactively diagnosing issues and risks. Receive guidance to improve the health, performance and stability of your Dynamics 365 Customer Engagement instance.

Objectives

- Perform a comprehensive review of your Dynamics 365 Customer Engagement instance.
- Identify key areas of improvement in the instance that includes general performance, best practices, configuration and settings
- Obtain a Health Score for your instance, and next steps towards improving the health and stability of your Dynamics 365 Customer Engagement instance.

Outcomes

- A report outlining the overall Health Score with detailed information on any issues found regarding performance, exceptions, configuration, and best practices for your Dynamics 365 Customer Engagement instance.
- Recommended additional services we provide that can help mitigate some of the risks outlined

Methodology

Assessment

Perform an in-depth evaluation with a Microsoft engineer and generate your first set of results.

Review and analysis

Analyze your results and examine the issues identified and how to remediate them.

Develop a plan

Develop a plan to help you remediate issues and improve your environment.

Scope

The scope of this assessment is to analyze operational data and provide you with valuable insights into the health of a single Dataverse instance.

Agenda

Day 1: Kick Off and Questionnaire hand off

Day 2: Data Analysis by Microsoft

Day 3: Final Presentation and Next Steps

Delivery Outline

Participants

Roles include Solution Architect, Database Administrator, Infrastructure Engineer, Developer, IT Manager and any other relevant resources

Skill Requirements

Experience in Dynamics 365 Administration or Dataverse administration

Time Commitment

3 full-day engagement with relevant roles

Delivery Requirements

Customer needs to provide Dataverse environment URL to analyze

Day 1-3 details

Day 1

- Kick-off meeting, discuss Assessment Overview

Day 2

- Review Roles and Responsibilities

Day 3

- During this phase, we aim to understand your current business processes and any specific concerns you may have with your Dynamics 365 Customer Engagement instance. We also provide you with a Questionnaire that needs to be answered to understand functions and areas that cannot be detected using telemetry.
 - Microsoft Engineer will analyze the data collected
 - Customer to provide responses to the Questionnaire back to Microsoft
 - Q&A with engineer
 - Review Final Presentation outlining Health Score, Risks & complexities
 - Discuss Next Steps

If you are interested in this engagement for your organization, contact your Microsoft Account Representative.