

Dynamics 365 Customer Engagement Migration Assessment

Assessment Program

Duration: 3 Days [Remote]

Difficulty Level: 300 - Advanced

Description

The Dynamics 365 Customer Engagement Migration Assessment is the first step towards transitioning to the cloud. In this service, we analyze your on-premises Customer Relationship Management (CRM) deployment comprehensively, and examine the migration considerations and complexities of moving your CRM solution from on-premises to the cloud.

Objectives

- Understand the advantages of migrating from an older on-premises CRM solution to the cloud
- Identify the business objectives and align them with the functionality of Dynamics 365
- Gain insights into optimizing the migration process with a focus on minimizing both effort and expenses
- Plan your next steps towards cloud transformation and receive a high-level assessment of migration considerations and complexity

Outcomes

- Understand the detailed report that outlines the complexities and levels of risk associated with migrating your on-premises CRM deployment to Dynamics 365 in the cloud
- Utilize the additional services offered by Microsoft experts that can help mitigate some of the outlined risks
- Consider the overall migration recommendation provided by Microsoft experts

Methodology

Initiate

The assessment begins with an initial kick-off meeting. During this session, we will present an overview of the Assessment process and discuss the following topics:

- Introduction
- Roles and responsibilities
- Questionnaire
- Data collection tools and instructions

Discover

We will examine your organization's current business processes and systems. Our goal is to understand the utilization of CRM and the complexity levels of configurations, customizations, and integrations employing a combination of tools, questionnaire, and functional demos.

Analysis

We will use the output from the tools and the responses from the questionnaire to analyze and assess the complexities and risk levels for the migration to the cloud.

Review

We will review the findings with you and offer a comprehensive recommendation for cloud migration.

Scope

Scope of this Dynamics 365 Customer Engagement Migration Assessment is to analyze the complexities and risks of migrating your on-premises CRM deployment to the cloud, and provide a recommendation as well as next steps for the cloud migration.

Agenda

Day 1:

- Kick-off and data collection tool setup

Day 2:

- Check-in/follow-up, and functional demo

Day 3:

- Final presentation and discuss the next steps

Delivery Outline

Participants

- Dynamics 365 architects
- Database Administrators
- Infrastructure Engineer
- Developer
- IT Manager
- Any other relevant resource(s)

Skill Requirements

- Understanding of your Dynamics 365 business processes and administration activities

Delivery Requirements

- **Tools Machine:** The Tools machine is the computer used to run the Migration Platform Assessment Tool for data collection. The machine will be used to connect to SQL servers in the Dynamics CRM Deployment and retrieve configuration information from them. System requirements for the Tools Machine will be sent separately.
- Computer with Windows 10 or later
- Audio equipment
- Internet access
- Modern browser and at least 1 Mbps bandwidth per participant. Microsoft Teams for remote deliveries

Delivery Outline

Day 1:

- Kick-off meeting
- Discuss Migration Assessment Overview
- Review Roles and Responsibilities
- Receive Questionnaire to be filled up
- Setup Data Collection Tool in Tools Machine

Day 2:

- Review of *day-in-the-life* use of your CRM system
- Assess Questionnaire responses and data collection results
- Review of Questionnaire responses for any open items

Day 3:

- Review final presentation outlining risks and complexities for migration to the cloud
- Discuss next Steps

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