



MICROSOFT DYNAMICS 365 CUSTOMER ENGAGEMENT AWARENESS & DESIGN STUDIE

Microsoft is offering a powerful, cloud-based CRM business tool in the form of Dynamics 365 Customer Engagement. Once it is properly implemented and in use, you will evolve from reactive business decisions to proactive insights. The tool is hyper-configurable, with your own unique combination of functionalities giving you a competitive edge.

Already convinced of its added value for your company? If so, do you know which combination of functions will bring you the most benefit? Using an approach based on co-creation and visual facilitation, we can work with you to configure this tool correctly for your specific needs and wishes.

Dynamics 365 is delivering a revolution in CRM and ERP by applying intelligence to all types of data. This enables organizations to evolve from reactive business decisions to proactive insights. Your employees are handed a powerful tool to support all kinds of business processes (such as sales, marketing, customer service, field services, etc.), thus allowing them to efficiently accelerate business outcomes.

THE RIGHT FIT FOR YOUR ORGANIZATION

Setting up a new CRM solution takes effort. This is an investment, and your employees will need to adopt a new way of working. Before you start tackling this, you need to clearly know which options exist and how the tool can be adapted to meet your specific needs. Through our study, we can map out how D365 CE can fit into your current process in a way that provides you with enhanced support in the future, thereby enabling you to realize the full potential of your organization.

Give employees the right tools to work with so they can better monitor and analyze their processes and results, and get to grips with new CRM insights. Your customers will be contacted with more focus, and they will feel that you understand them better. After all, committed employees will deliver a positive, unique customer experience. The satisfaction of both your employees and your customers will increase.



OUR WAY OF WORKING



Co-creation

Steps taken together are firmer. This study is therefore also a joint effort. By actively working with all the stakeholders on your side and the requisite skill profiles from Realdolmen's side from beginning to end, we will gain a clear understanding of your situation and your goals.



Visual facilitation

We use visual templates in our work. This enables us to rapidly collect ideas, gain a clear overview of the process and work our way towards a result to which everyone can contribute. Experience has taught us that this approach ensures involvement and a clear overview.



Agile approach

After each workshop we re-evaluate and adjust course where necessary. This allows us to remain on course towards achieving the best possible solution for you.



FROM TRIGGER TO RESULT – THE PATH OF THE STUDY

A successful D365 CE project always starts from a specific trigger – an area of concern in your organization that relates to CRM. We determine this through the various workshops and work together to find a suitable response. During this journey there are three important steps: understanding the need, defining the solution and implementing the tool. This study sheds light on the first two, and we can add the third one if desired in the form of a detailed implementation project.

Given that your trigger arises within your unique business context, we will always adapt our study to you. We do, however, follow a basic structure that consists of four workshops.

Kickoff workshop

- We identify the correct stakeholders who join us around the whiteboard.
- We uncover the challenge and its associated bottlenecks.
- We plant a flag, stating what the desired outcome is and what the project should deliver at the end of the day.
- We map out your ecosystem.

Understand workshop

- We define the necessary steps.
- We jointly review your current system and working methodology.
- We spend some time on the bottlenecks and frustrations currently in place.
- We distinguish the symptoms from the causes.

Define workshop

- We define the needs.
- We map out what impact we want to achieve and what this requires.
- We set priorities based on defining values.

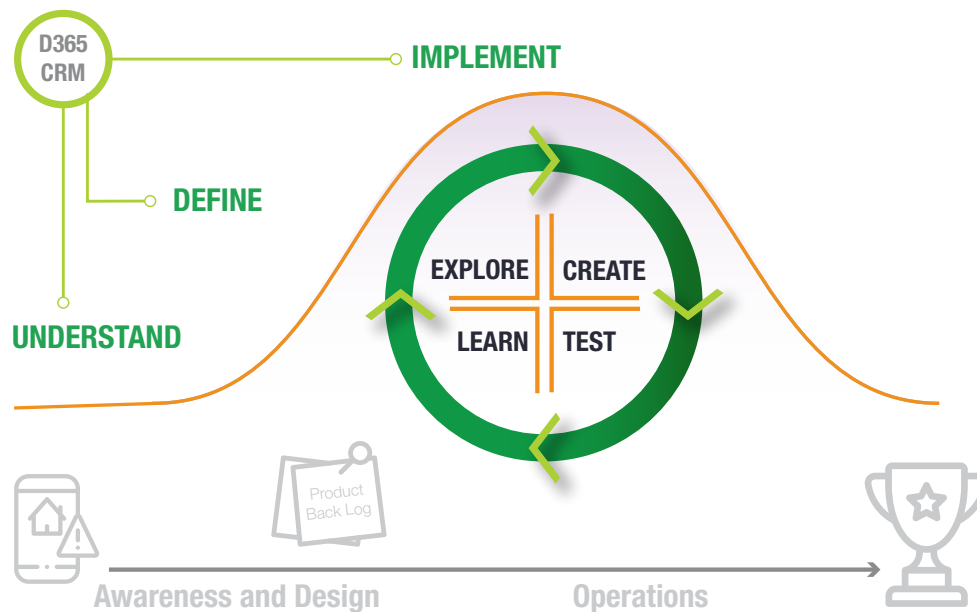
Review of results of study & next steps

- We present the design of the D365 CE solution required to achieve the defined goals.
- We analyze the relationship between the effort and the desired impact.
- We evaluate the added value that can be achieved.
- We run through a product backlog with a high-level overview of user stories.

Sometimes the challenge is especially complex, and some intermediate steps may be necessary. These might be:

- An architecture workshop to draft the new technical architecture.
- Customer Journey Mapping
- A deep dive session to take a close look at your processes.

DYNAMICS 365 CRM PROJECT



READY TO GET TO WORK?

Once you know where the flag has been planted and how to reach it, you can get started on the implementation of the tool. We also have plenty of in-house expertise to help get the entire solution up and running and integrate it into your current IT landscape.

About Realdolmen

We strongly believe that people make the difference, not just technology. We are convinced that ICT can help people and companies to work more efficiently and simply. This is why our primary focus is on people, their potential and the results that organizations want to achieve. From here, we work out a technological solution. For us, ICT is a means, not a goal in its own right. Hence our mission statement: "we make ICT work for your business".

Would you like more information about this study?

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