

MICROSOFT DYNAMICS 365

Requirements Scoping Overview

1

PREPARING FOR CRM

- Readiness for CRM Workbook
- CRM Insiders Guide eBook
- Follow 11 Step Plan for CRM
- Complete Business Process Planning Questionnaire



2

REQUIREMENTS SCOPING MEETING

A meeting held between your stakeholders and the Preact project team. This will define your CRM vision and ensure that all parties are clear on the entire requirement including data migration, Microsoft Dynamics 365 integration, managed processes and database build.

3

DOCUMENTATION

Following the Requirements Scoping Meeting we will submit these documents:

Project Charter - setting out your objectives and vision. This document will detail the project scope, key milestones, success criteria, project risks and the responsibilities of each party.

Statement of Work - a technical document detailing how Preact will deliver your project, this will also include the solution estimate.



4

REVIEW MEETING

- Dynamics 365 proof of concept demonstration
- Documentation review
- Fixed cost quotation

5

PROJECT SIGNED OFF

The Microsoft Dynamics 365 Statement of Work including any revisions is signed off and implementation work commences.

