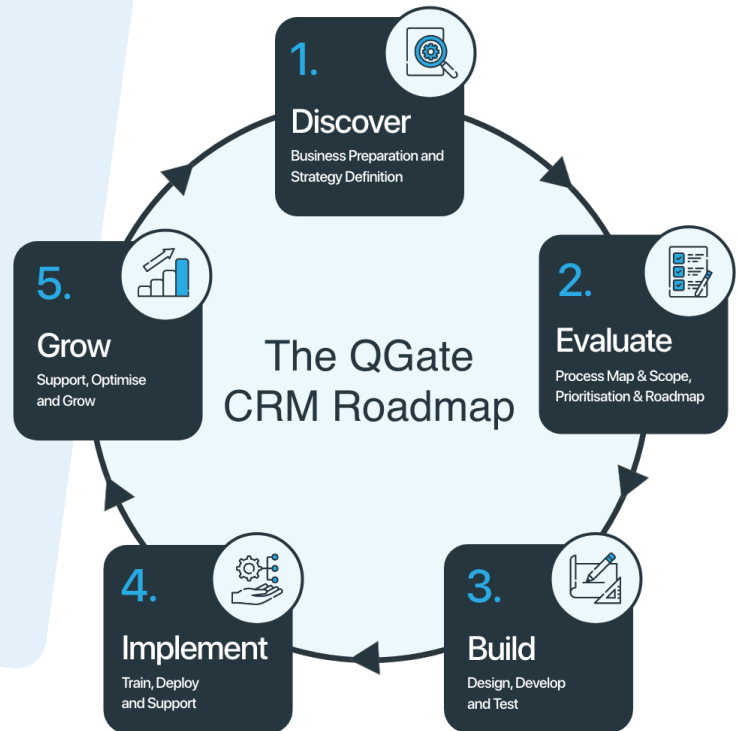# The QGate CRM Roadmap

The **QGate CRM Roadmap** will guide you and your business successfully through your **Microsoft Dynamics 365 CRM project.**

QGate has 25 years' experience of delivering CRMs and digital transformation across many industries and organisation types.

This means that we have the knowledge and expertise to develop you a CRM that exceeds expectations, enabling you to **transform your business** and create happier teams and happier clients.

1. Discover — Business Preparation and Strategy Definition

5. Grow — Support, Optimise and Grow

2. Evaluate — Process Map & Scope, Prioritisation & Roadmap

The QGate CRM Roadmap

4. Implement — Train, Deploy and Support

3. Build — Design, Develop and Test

Discover - Business Preparation and Strategy Definition

1. Discover — Business Preparation and Strategy Definition

The Discover Phase is about understanding your business needs and strategy.

Our experienced business analysis team will work with you to discover and define:
- Goals and Objectives, both business and project level
- Business functions requiring CRM, e.g. sales, marketing etc
- Technology infrastructure and existing systems
- Business pain points and issues
- Data sources

At the end of the Discover Phase, we will provide you with the following:
- CRM Readiness Assessment and recommendations
- Estimated costs to help you assess the financial feasibility
- Requirements Workshop Statement of Work (SoW)

Evaluate - Process Mapping/Scoping, Prioritising & Roadmap

2. Evaluate — Process Map & Scope, Prioritisation & Roadmap

During an interactive workshop with your key users, we will the uncover the information we need to form an accurate process map.

The outcome will be a Scope Statement of Work (SoW) that contains; Business Process Flow, Process Map, Wire-frame User Interface and **Field Map of automation and calculations**

From the Scope Statement of Work, we estimate the size of each requirement and pass this list for you to prioritise. Each 'must have' priority becomes an element of your Minimum Viable Product (MVP), and it's this MVP which we provide a quote against.

3. Build

Build - Design, Develop and Test

With the Delivery Statement of Work agreed, we begin to develop your CRM in Microsoft Dynamics 365. QGate uses Agile software development methodology, which reduces risk and increases product quality, visibility and satifaction, to deliver faster ROI.

Work is broken down into weekly Agile 'sprint' cycles, where tasks are completed during the week and demonstrated back to the customer at the end of each week. This allows regular early visibility and the opportunity to offer feedback and make changes.

We continue weekly development Sprints these until all prioritised requirements and change requests have been completed, deployed to UAT environment and signed off.

4. Implement
Train, Deploy and Support

Implement - Train, Deploy and Support

During the Implement Phase our focus will be on deployment, training, and handling feedback. Our role is to ensure that your CRM becomes part of your organisation's community, processes and, most importantly, to support users in their engagement with the CRM system.

In this phase, we will provide you with:
- Provision of a full system walkthrough
- Set up users, licensing, and permissions
- Manage data imports and system integrations
- Issue a user manual
- Carry out any agreed training session(s)

5. Grow
Support, Optimise and Grow

Grow - Support, Optimise and Grow

Choosing QGate means choosing a partner with whom you can develop a long standing and valuable partnership. This continues with our high-quality, flexible and affordable Support Packages to ensure that your CRM continues to meet the needs of your business.

Once the initial CRM is embedded in a business, we typically find that requests for additional integrations, functionality and automations follow. We therefore offer CRM Follow-On and Development Packages for both small and significant enhancements to your CRM.

Each of these requests will be treated as individual projects and given the same care and attention that you received during your initial implementation.