

## The QGate CRM Roadmap



**A Guide for Business Managers on the Successful  
Implementation of Microsoft Dynamics 365.**

# Trust QGate with your Microsoft Dynamics 365 Implementation

If your organisation is considering the implementation of a CRM (Customer Relationship Management) solution, it can feel like a daunting prospect. As with any new technology, the risks of failure are high, however a CRM has the potential to benefit your business in many ways:

- ✓ Find the right customers
- ✓ Build more sustainable relationships
- ✓ Reduce the cost of sales
- ✓ Increase employee productivity
- ✓ Offer better customer service
- ✓ Improve customer retention

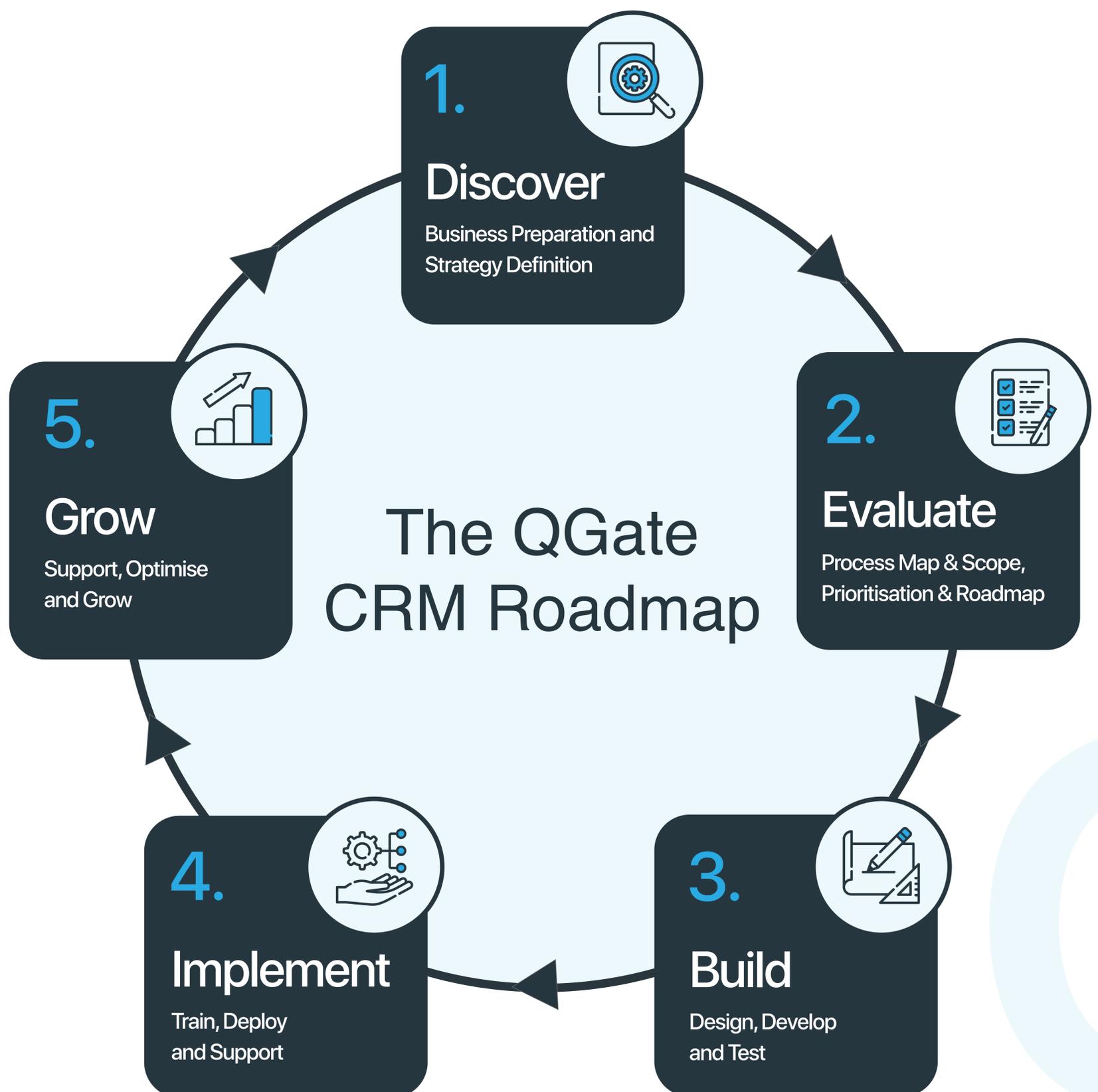
Our 24 years' experience of working across many industries and organisation types means that we have the knowledge and expertise to help you avoid the pitfalls and deliver a CRM that exceeds expectations, enabling you to transform your business and create happier teams and happier clients.

This guide aims to explain the stages of a successful CRM delivery project from initial definition through to delivery and ongoing growth, using a process we call **The QGate CRM Roadmap**.

# The QGate CRM Roadmap

The QGate CRM Roadmap is a framework to guide you and your business successfully through your CRM project. Our framework is proven to deliver better results, faster, and with less effort.

The QGate CRM Roadmap consists of 5 stages:







# Phase 1 Discover

## Business Preparation and Strategy Definition

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

Firstly, we will step you through our CRM Readiness Assessment, a series of questions that will benchmark where you are in your CRM preparation and what steps you can take to move forward.

Our experienced business analysis team will then work with you to discover and define:

- Goals and Objectives, both at business level and project level
- Business pain points, issues, and critical requirements
- Business areas requiring CRM, e.g. sales, marketing, customer service, field service, etc.
- Current/planned technology infrastructure and existing systems which will need integration with CRM
- High-level view of the scope of deployment, i.e. users and their geography
- Possible data sources for your new CRM

**The output of the Discover Phase is to agree on the scope of the Requirements Gathering Workshop** – the sign of which is the project 'Gate' and agreement that we are both happy to progress with the next phase.

At the end of the Discover Phase, we will provide you with the following:

- Readiness Assessment
- Estimated costs to help you assess the financial feasibility
- Requirements Workshop Statement of Work (SoW)



# Phase 2 Evaluate

## Process Mapping/Scoping, Prioritising & Roadmap

### Process Mapping

Here we identify the steps of the processes you are looking to support within your CRM system. During an interactive workshop with your key users, we will uncover the following:

- Measures of success – what 'good' looks like and how do we measure it
- To-be process map – the 'micro' steps to be carried out by users
- Process phasing – group the steps into sensible phases, for example, a sales process might be: Lead, Qualification, Conversion, Delivery, After-sales
- User Profiles – establish which user roles are required and their permissions
- Technical aspects – data, system integration, and documentation requirements

The level of detail required can be difficult, but do not worry, our workshop facilitators will walk you through the process and translate what is in your head into 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
- Field Map of automation and calculations



# Phase 2 Evaluate

## Process Mapping/Scoping, Prioritising & Roadmap

### Scoping, Prioritising and Roadmap

The objective of scoping is to produce a **Delivery Statement of Work (SoW)**. To do this 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.

The Delivery Statement of Work (SoW) contains 4 items:

- **DevOps Project** – Azure DevOps project will be created as the home of your requirements. During development, you will be able to track progress, comment or re-prioritise your requirements as appropriate
- **Requirements List** – for those unfamiliar with DevOps we will issue a full Excel list of all requirements, their priority, size, description, and acceptance criteria
- **Commercial Agreement** – this will be the terms and conditions which references the product requirements list
- **Quotation** – we provide a quotation for the time/cost required to complete the Minimum Viable Product which you have prioritised

It is important to note that up to this point, no commitment has been made to us as a partner to do the development work or any technology choice made.

This approach allows trust to be built between you and QGate as a partner without fully committing.



## Phase 3 Build

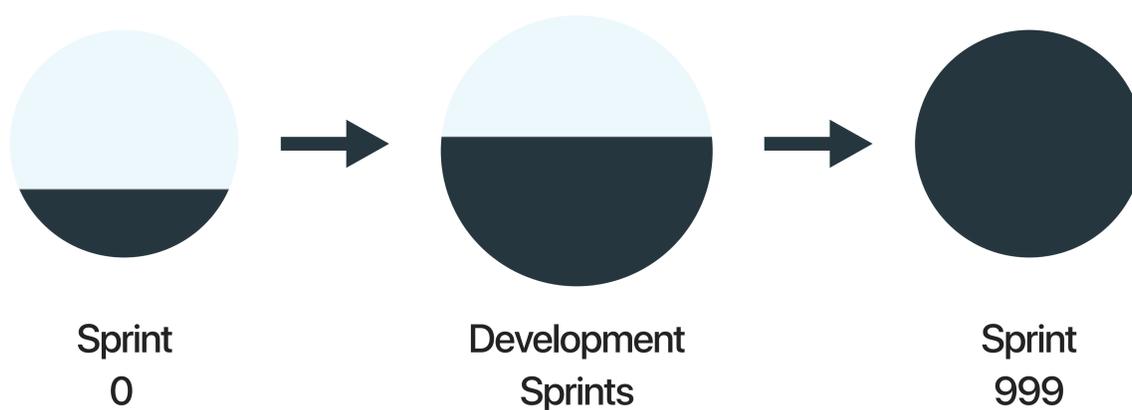
### Design, Develop and Test

With your commitment in place and the Delivery Statement of Work agreed and signed off we begin to develop your CRM in Microsoft Dynamics 365.

QGate uses **Agile software development methodology**, which is proven to deliver:

- A higher-quality product
- Greater customer satisfaction,
- Increased project/customer visibility and control
- Reduced risks
- Faster return on investment

Using Agile, work is broken down into weekly 'sprint' cycles, where tasks are completed during the week and demonstrated back to the customer at the end of each week. Sprint cycles allow you to get frequent early visibility of what is being built, offer feedback and make changes.





# Phase 3 Build

## Sprint 0

Sprint 0 is a precursor to the start of development, and typically happens a week or two before the start of development. It is designed to clean up and set up the foundations for a successful project.

### What's Involved:

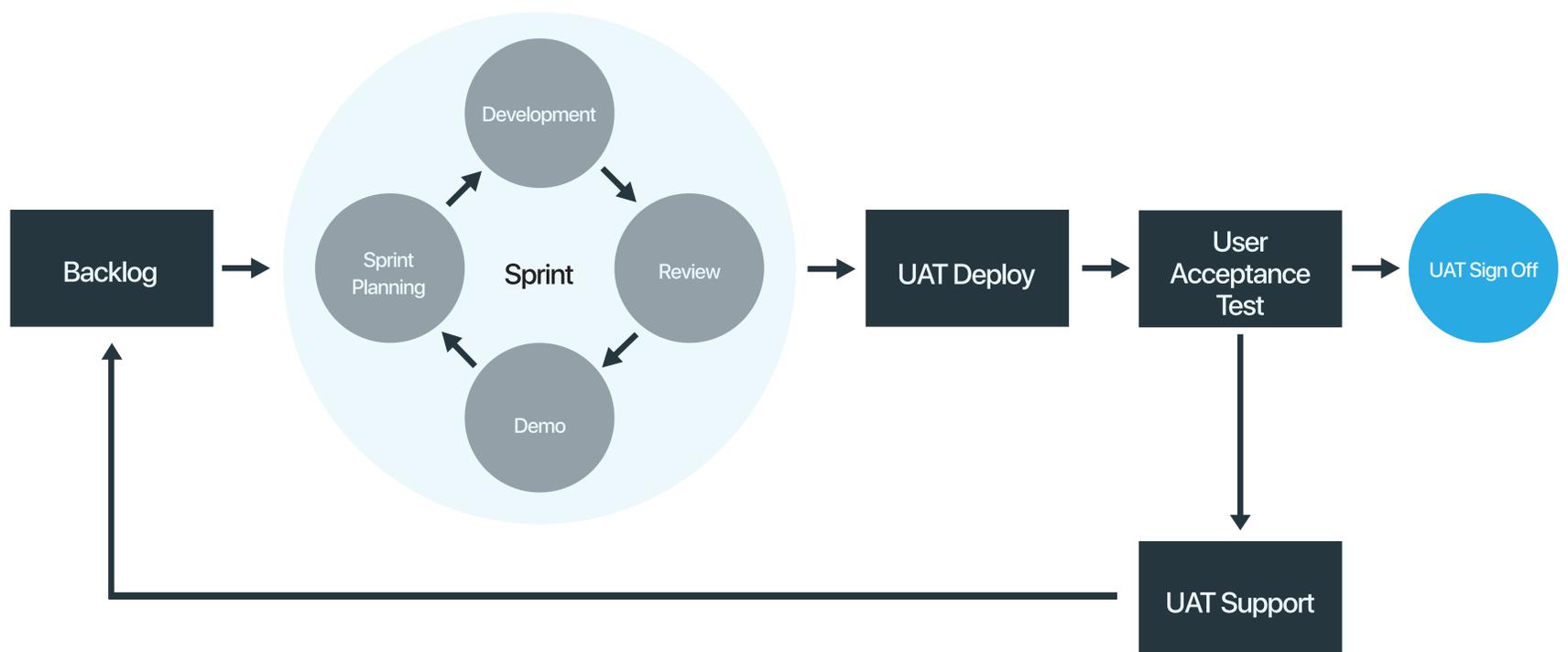
- Assess and structure your current or create new Dynamics 365 environments
- Work with your Office 365 provider to get service users in place
- Plan out your development sprints
- Highlight, collate and issue open questions for resolution
- Train your users on DevOps use (optional)
- Finalise any contracts or paperwork required



# Phase 3 Build

## Development Sprints

Development sprints are the main build stage of your Dynamics 365 system. Working in weekly cycles, we continue these until all prioritised requirements and change requests have been completed, deployed to UAT environment and signed off by you.



### What's Involved:

- Planning work to be done on Mondays.
- Refine requirements or add change requests requested by your teams.
- Build and configure your system according to the agreed requirements list throughout the week.
- Test functionality against requirement acceptance criteria.
- Deploy completed work to User Acceptance environment.
- If appropriate demo what was done and how it works.

Any work not signed off during user acceptance testing (UAT) is put back into the product requirements list to be rectified, listed as a change request, bug, or issue.



# Phase 3 Build

## Development Sprint

During the Build Phase we will provide you with the following for each Sprint:

- **Sprint Plan** – a list of user story requirements which will be worked on for that week
- **Sprint Demo Presentation** – at the end of each weekly sprint we will provide a progress report in the form of a presentation detailing work completed, budgeted time usage, and remaining budget
- **UAT List** – Accompanying the sprint demo presentation will be a list of work completed and the agreed acceptance criteria which are used by our customers to sign off completed work, i.e. does the requirement satisfy the acceptance criteria?





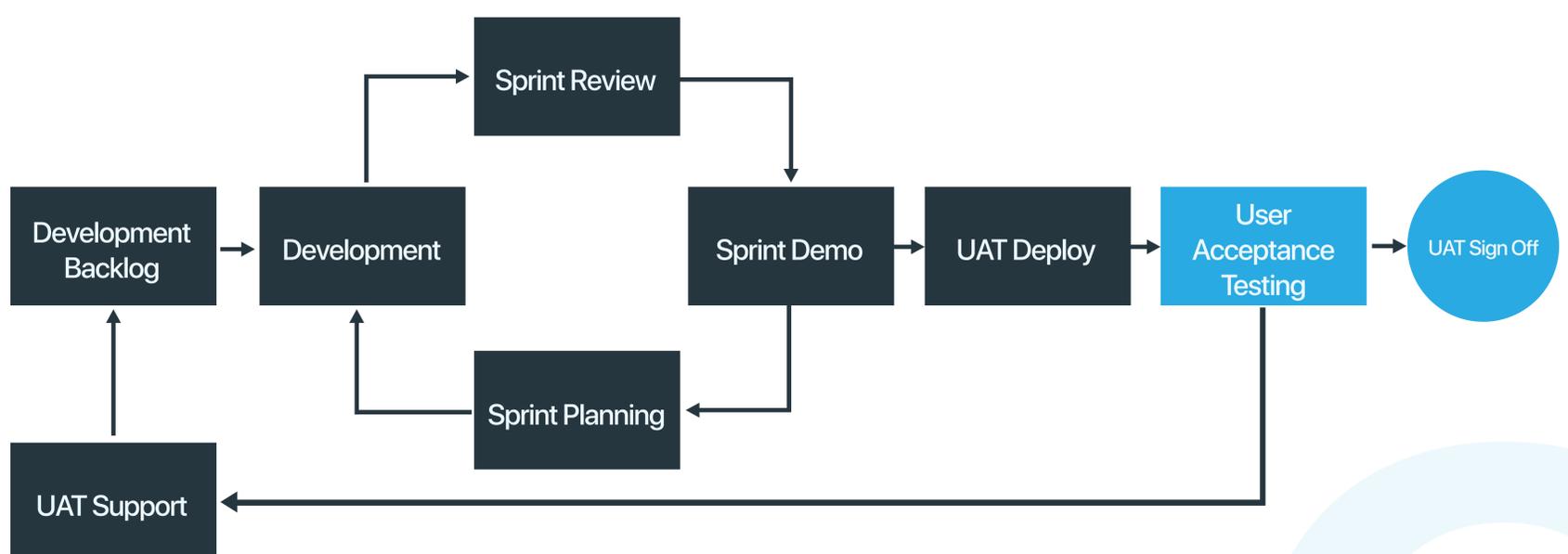
# Phase 3 Build

## Sprint 999

Sprint 999 is your go live. We carry out all necessary work that is involved in getting your systems, users and business live on Dynamics 365.

What's Involved:

- Plan with you your go live date
- Demonstrate end to end use of your new Dynamics 365 System
- Sign of system for release
- Schedule training on system use to all users
- Prepare for early go live support
- Complete any go live tasks



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# Phase 3 Build

## Sprint 999

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# Phase 4 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 system becomes part of your organisation's community, processes and, most importantly, we will support users in their engagement with the CRM system.

In this phase, we will provide you with:

- Provision of a full system walkthrough to demo end-to-end the process you defined during earlier phases
- Set up users, licensing, and permissions
- Manage data imports and ensure system integrations are in place
- Provision of access and guidance on how to access
- Issue a user manual
- Carry out any agreed training session(s)



# Phase 5 Optimise and Grow

## Support, Optimise and Grow

Congratulations - you are now up and running with your Microsoft Dynamics 365 CRM developed to your priorities, requirements and processes.

### Optimise

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

QGate Technical Support Packages include:

- Technical Bulletins to update you on service packs, hot fixes and resolutions to known issues
- Online ticket system providing 24x7 accessibility to the current status of your support ticket
- Annual system audits (on request) if you have a current support contract
- Monthly support report delivered to your primary technical contact
- Direct escalation process to Microsoft
- QGate Knowledge Base



# Phase 5 Optimise and Grow

## Support, Optimise and Grow

### Grow

Once the initial CRM is embedded in a business, we typically find that requests for additional integrations, functionality and automations follow. Some examples are:

- Business intelligence reports and dashboards
- Marketing automation and lead management
- Integration with other businesses systems
- Additional user requirements and functionality

We offer CRM Follow-On and Development Packages that can be adapted to address both small and significant enhancements to your CRM. Each of these projects will be treated as individual projects and given the same care and attention that you received during your initial implementation.

# Next Steps

Book a no-obligation 30 minute Discovery Call with one of our consultants.

The call is an ideal opportunity to discuss your CRM requirements and to ask any questions you might have.

Book online at [www.qgate.co.uk/contact](http://www.qgate.co.uk/contact) or  
call +44 (0)1329 222 800





# QGate

CRM • Digital Transformation • Automation

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