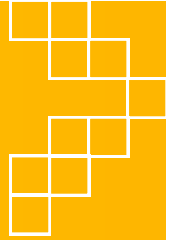


Microsoft Dynamics CRM HealthCheck



Make the most of your Microsoft Dynamics CRM investment by analysing its use and identifying potential improvements.

Maximise the benefits you realise from your CRM system.

According to Gartner, "55% of CRM initiatives fail to meet measurable business objectives." Make sure your system meets your objectives with the Microsoft Dynamics CRM HealthCheck from Intergen.

Implementing a CRM system is not a trivial exercise, and any implementation can encounter several pitfalls.

As leaders in the design and implementation of Microsoft Dynamics CRM, Intergen can help your organisation avoid these pitfalls and identify improvements to help your organisation realise maximum value from your CRM implementation.

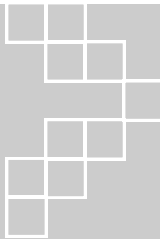
Our CRM HealthCheck service helps your organisation identify any factors limiting the success of your CRM system. Our analysis assesses the issues facing your system and its usage, and identifies the opportunities available to realise the benefits your customer relationship management system can deliver.

We will work with your business and technical representatives to analyse your processes and determine the next steps you need to extract the full value of your CRM investment.

By understanding how you use Microsoft Dynamics CRM, and determining the reasons why it may not be achieving your goals, we can highlight areas where improvements can be made.

Our goal, by highlighting these areas, is to help take your CRM system to new levels, driving user adoption, ensuring process compliance and ultimately increasing customer satisfaction and profitability.





Microsoft Dynamics CRM HealthCheck_

Customer Profile

This service is ideal for organisations who want to:

- » Improve the alignment of your CRM system to business strategy.
- » Improve CRM user adoption.
- » Drive process compliance to achieve consistent delivery.
- » Have your customers notice a visible improvement in performance.
- » Minimise business risk and ensure the integrity of the CRM solution.
- » Ensure that CRM measures and KPIs are reliable so that incentives can be tied to business outcomes.

Microsoft
GOLD CERTIFIED
Partner



Service Overview

Our CRM HealthCheck includes:

- » **Technical Design and Management.** We will assess the technical design and internal management of your solution, and identify any risks, issues and opportunities.
- » **Solution Design.** We will assess the CRM deployment to identify how well it supports your business strategy including how well processes are supported and how business measures represent performance.
- » **User Acceptance and Adoption.** We will assess your users understanding of what the solution can offer and how well they apply it to their role. We will also identify any gaps in training.
- » **Data Quality.** We will assess the quality of your data and identify any areas of improvement.

On the completion of the CRM HealthCheck we will present to you the following:

- » **Dynamics CRM Scorecard.** This measures how your CRM implementation compares to other organisations. Focusing on technical implementation, user adoption, training, and data quality.
- » **Quick Wins.** Identify easy to implement system improvements.
- » **Roadmap.** A plan of where to from here, short and long term options to improve the system.

Following the presentation of the report our CRM experts will facilitate a discussion to gain feedback, provide further solution information and help your team agree priority items for action.

Note: The deliverables referenced above are representative of the base service offering. These deliverables can be customised or expanded according to your business requirements.

Pricing

The CRM HealthCheck service is priced at \$3,000 (excluding GST and any disbursements).

Key Benefits

We can assist your organisation to:

- » Align strategic objectives and service values.
- » Understand the key activities required to retain and gain profitable customers.
- » Gain a better understanding of the solution and how it will best support requirements.
- » Increase end user satisfaction through enhanced productivity and better business outcomes.
- » Implement appropriate leadership and governance to drive CRM as a key platform.

More information

Contact InterGen now to book your CRM HealthCheck service, or visit www.intergen.co.nz for more information.

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www.intergen.co.nz