

# Dynamics On-Prem to Online Assessment

Innovate with a turnkey solution in the cloud and integrate every part of your business

The traditional approach of managing and maintaining your customer relationships with an on-premises solution is not as efficient and intelligent as if the solution lived in the cloud. On-premises CRMs generally lack the latest security updates, capabilities, and analytics. Without the right CRM solution, you may miss growth and revenue opportunities as the customer insights may not be easily found by your sales team. Keeping up with the legacy systems can be time consuming and costly.

Migrating to a cloud-based CRM, such as Dynamics 365, can give you a competitive advantage. Automating your business processes, visualizing intelligent insights, and staying up to date with the latest security trends are just some of the benefits moving your CRM to the cloud would have.

Quisitive's **Dynamics On-Prem to Online Advanced Assessment** can help you understand the benefits and the steps required to move from a legacy on-premises CRM to Dynamics 365. Quisitive will determine your most efficient next steps through a high-level assessment of migration considerations, resourcing needs, risks, cost, and environment complexity. Our Dynamics experts will identify and capture your business objectives and connect them into the functionality of Dynamics 365, taking into consideration your business goals and needs. Quisitive's Dynamics On-Prem to Online Assessment provides you with a roadmap to ensure that your D365 environment is healthy and productive.

## How it Works:

### 1. GUIDED DISCOVERY AND ASSESSMENT

We assess your current environment and resources. We identify migration, cloud platform and customization readiness. We also discover your business goals and needs.

### 2. ANALYSIS

We analyze your environment posture, identify your technical opportunities, and assess your organizational readiness.

### 3. ROADMAP DELIVERY

Quisitive creates a roadmap to ensure a successful migration to Dynamics 365, including timeline and resources commitment. Quisitive's roadmap makes sure your company efforts yields results and the ROI of your investment in Dynamics 365 leads to profitability.

**What You Get:** A detailed roadmap for a successful migration, including timeline and resource commitment plus up to three components of your choosing. Components listed on the back side.

**Length:** 4-5 weeks

**Cost:** \$20,000

## Benefits & Value

- *Improve reliability and system uptime*
- *Access the latest security and functionality*
- *Empower your team with AI and predictive analytics*
- *Enhance collaboration with content accessible from anywhere on any device*
- *Automate and optimize business processes*
- *Reduce costs of system maintenance*

## ON-PREM TO D365 MIGRATION ASSESSMENT COMPONENTS

<b>Business Value Analysis (BVA)</b>	BVA assessment is a way of understanding the total economic impact that a customer would realize by moving to the cloud. Performing a BVA will help uncover potential cost-savings and productivity gains establishing a compelling economic reason to migrate to the cloud. This will also help the customer to align migration efforts with business outcomes. This component also includes a high-level ROI analysis.
<b>Deprecation plan</b>	With the rapid pace of innovation there are often items on-premises which are no longer available when moving to Dynamics 365 online. Deprecation planning assesses those key items that will be affected going to the cloud and offers recommendations, best practices and alternative solutions that a customer should consider.
<b>Envisioning</b>	Conducting an envisioning workshop is a great way to generate ideas and ensure all the key stakeholders on the migration project are heard. A design thinking workshop can help form a prioritized list of requirements that can be used in the design and help shape future phases of digital transformation.
<b>Functional assessments</b>	A customer's business process may have changed over the lifecycle of their Dynamics onpremises deployment. This means that the existing system processes today might not be the best fit for an online deployment. This analysis drills into the most important functional requirements and re-evaluates them with best practices and recommendations for Dynamics 365.
<b>Industry accelerators</b>	Microsoft industry accelerators/3rd party templates can help with time to value on Dynamics 365 cloud migrations. If there is a particular vertical solution that addresses a known functionality gap, then this analysis can help in exploring potential use case scenarios post migration.
<b>Industry best practices</b>	What a customer might know and rely on in the on-premises world may no longer apply when moving to the cloud. Based on the results of the assessment, there may be specific areas which warrant further response, this item is an opportunity to expand on industry best practices, especially as it relates to functional and technical elements of Dynamics 365 online.
<b>Integration Options</b>	Existing integrations running on-premises may no longer run when migrating to the cloud or may no longer be needed. Dynamics 365 is a cloud solution built on the latest technologies and industry standards. The goal here is to assess those existing integrations for cloud compatibility, security, technical feasibility, and performance.
<b>Migration plan</b>	The effort here is to understand what a future state deployment of Dynamics 365 might look like and produce a high-level system blueprint. This might include items such as conceptual solution architecture, high level gap-fit by business processes, integration strategy, data migration strategy and/or deployment strategy.
<b>Proof of Concept</b>	Working with the customer to build out a limited scope proof of concept (demo) using Dynamics 365. The idea being the customer can get hands on with the solution, prove value and see the desired end results.
<b>Reporting</b>	This item makes recommendations on reporting options for Dynamics 365 online. Examples include detailed reporting and Business Intelligence assessment broken down by operation reporting, financial reporting, business document reporting and analytical reporting. Recommendations could also include other reporting options with the latest technology including Power BI, Power Automate & Azure Data Lake service integration.