

The Below Project describes the scope of consultancy for Microsoft Dynamics CRM 2015 performed for *\*\*Removed for Privacy\*\**.

### **Purpose:**

- a. To Analyse the business across all departments and all the processes end to end and provide an unbiased recommendation if Microsoft Dynamics CRM is the right product for the company.
- b. To explain to the Management and Key stake holders how dynamics works so they have an idea when negotiating with the CRM Partner.
- c. Demonstrate some key requirements in workflow and processes in a sandbox environment.
- d. Demonstrate custom Reports which the management was keen to see.
- e. Analyse the number of licences and types that will be required.
- f. Provide a comparison of pros and cons between Dynamics 2015 on premises and Cloud.

**Project Size:** The Magnitude of the project was 125 Licences, divided into 5 Dynamics GP for Finance department, 6 Dynamics CRM Enterprise for Management and system administrators, 4 Professional seats for Underwriters and 110 Dynamics Basic Licences. 3TB of added SharePoint storage space.

### **Key Requirements:**

- a. Streamline the sales process.
  - b. Streamline the Service Process.
  - c. Provide a DMS (Document Management Solution)
  - d. Provide an integrated Barcoding & Scanning Solution.
  - e. Provided an integrated Phone system.
  - f. Integrate to web based messaging system
  - g. Interface CRM to a compatible financial system.
  - h. Prepare a Migration strategy.
  - i. Provide a Reporting across Entities and Vertical Matrix.
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- a. **Sales:** The sales process in insurance is unique. They need new sales, add on sales and renewals. In this case the requirement was the users enter key data about the person as in age, date of birth, driver licence no, car registration no etc, then select if the requirement was for health cover or motor insurance, further key in insurance specific data. Dynamics was required to automatically query a number of pre-set criteria and propose three insurance premium quotes from three best providers, or a specific provider can be selected to generate a quote from only one provider. Quote is then sent to customer for approval, once approved, needs to go into billing for payment arrangement, (annual, quarterly or monthly). Once the arrangement is fulfilled a policy is generated and is sent to the underwriter, underwriter signs the policy and a final policy is issued.
  - b. **Service:** In this case was a claims process. When a claim is received send a series of notifications, sms to tow truck, email to policy vendor, email to 3 crash repairers, who qualify to repair the model of the car. The claim is recorded in the system and once the car is repaired the claim will close with a cost of repair recorded against it.
  - c. **DMS:** The number of documents being generated here are immensely high, these need to be physically signed and stored in the system. I recommended Microsoft SharePoint as a DMS which seamlessly integrates with Dynamics online and on premises and would be able to store all the documents linked against the CRM entity.

- d. **Integrated Scanning Solution:** On a daily basis over a 1000 policy and claims documents are scanned and stored. Dynamics will be integrated with a Barcoding system so when any document is printed it puts the barcode on each page. Then a scanning application which reads that barcode when put through a scanner and sends it to where it belongs, in turn linking it to the CRM entity, Quote, Policy, Claim.
- e. **Integrated Phone System:** 3CX IP Phone system can integrate natively with Microsoft Dynamics so when the user picks the call the caller id is recognised and one of the three records between Case, Contact or Account, can be automatically opened, This provides speed of service and avoids errors on number recording. Also a call recording system.
- f. **Integrated MMS System:** An integrated MMS system which could receive photos of the damage and link to the CRM entity.
- g. **Interface with a Financial system:** Microsoft Dynamics GP was the solution which can seamlessly interface with CRM on a 2way communication, wherein data can be queried from both ends.
- h. **Cross entity reporting:** Dynamics was required to provide reports like Cost of ownership, which is total turnover vs total cost (claims and labour). Also clients have multiple branches or companies, so the idea was to report from parent account and be able to drill down to a contact level.

#### **Microsoft Solutions Recommended:**

- a. Dynamics CRM Online
- b. Dynamics Mobile Application
- c. Microsoft SharePoint Online/ On Premises
- d. Office 365
- e. Microsoft Exchange online
- f. Skype for business

#### **Tools Used:**

Microsoft Dynamics and Office 365 Portal

Microsoft Visio for process Mapping

Microsoft Sure Step recommended for managing the project.