

# Pre-Project Questionnaire

Email:

## Company and Contact Information

*The questionnaire is intended to help form an agreed and shared vision for how this investment will support business success. Cloud9 would recommend an internal workshop with your key stakeholders to complete it. It is important for the client to understand this project should be planned as a journey with additional phases to ensure full ROI and benefits are achievable.*

**Company Name**

**Project Lead Name**

(for project communication)

**Project Lead Email Address**

**Project Lead Telephone No.**

**Project sponsor and summary of how they will define future project success**

**Key stakeholders and summary of how they will define future project success**

**Target Training Date (d/m/yy)**

**Target Go Live Date (d/m/yy)**

**Project budget \***

(not including Licences)



## Project Overview

*Confirm which phase(1,2,TBD) (if any) you require this functionality in Dynamics CRM Online.*

### **Marketing (Leads, Campaigns, Marketing Lists):**

**Marketing-Details:**

### **Sales Management (Customers, Opportunities, Goals):**

**Sales Management-Details:**

### **Service Management (Cases, Queues, Service Calendar):**

**Services Management-Details:**

### **Field Service (Management of Field Engineers, Maintenance or Deliveries etc.):**

**Field Service-Details:**

### **Project Service Automation (Resource, Time and Expense Management for Projects):**

**Project Service Automation-Details:**

### **Other Processes (Events, HR, Subscriptions/Memberships):**



**Other Processes-Details:**

**Indicate existing CRM software used and/or source of existing data that will be migrated to Dynamics CRM:**

**Provide a summary of initial requirements, including any functional capability or business processes:**

**What improvement in customer experiences would you like Dynamics to support?**

**List below which record types (entities) you require importing into CRM + volume of data for existing records:**

**Describe the cultural sensitivity to change in the business & perception of key stakeholders of this CRM project:**

**Capture current business challenges, pain points and/or strategic goals to be addressed by implementing Dynamics CRM and overall benefits of CRM expected:**

**Describe project risks (e.g user adoption, past CRM experience, significant process transformation etc.):**

**Will Dynamics CRM online integrate with other Microsoft software applications?**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Office 365              | <input type="checkbox"/> Microsoft Exchange | <input type="checkbox"/> Skype for Business |
| <input type="checkbox"/> Outlook (2010 or later) | <input type="checkbox"/> Sharepoint         | <input type="checkbox"/> Power BI           |