

Cloud9 Insight Ltd  
6<sup>th</sup> floor 177 Preston Road,  
Brighton, East Sussex,  
BN1 6AG  
Main Line: +44 (0)1273 921 510  
Website: <http://www.cloud9insight.com>



## Fast Track Statement of Work

Author(s):	Version: V1
Reviewed by: Carlene Jackson	

### Cloud9 Contact Details:

Curt Bean

Phone: +44 (0) 1273 921 770

Email: [curt@cloud9insight.com](mailto:curt@cloud9insight.com)



Microsoft  
Dynamics 365

**Microsoft Partner**  
Gold Customer Relationship Management  
Silver Midmarket Solution Provider  
Silver Cloud Productivity  
Silver Small and Midmarket Cloud Solutions



**Table of Contents**

1	Confirmation to Proceed with Fast Track .....	3
2	Summary Scope of Project .....	6
2	Fast Track Methodology .....	7
3	CRM Maturity Roadmap .....	8
4	Why Cloud9 Insight.....	9
5	Additional Services Provided by Cloud9 Insight.....	10

# 1 Confirmation to Proceed with Fast Track

Please print, sign and scan and email the following 3 pages to [accounts@cloud9insight.com](mailto:accounts@cloud9insight.com) to confirm your requirements workshop. We can also send you a docusign version of this statement of work for your convenience. Email Accounts@cloud9insight or call us on 01273 921510 to request a docusign version.

Requirements Approach	Insert suggested dates against preferred requirement approach
Requirements & Design 4 hours (2 Remote web-based Requirements & 2 hour requirements write up)	
One day Requirements and Design session at Cloud9’s Brighton Offices	

Following on from the requirements session the following budgets are recommended:

Fast Track Components	Payment Due
Standard Fast Track Phase 1 Configuration of CRM, data import and training	After sign-off of requirements but prior to commencing configuration

The project will commence with a requirements session which will support identification of exact scope and requirements to be delivered. Requirements gathered within scope will be mutually prioritised to be delivered within the agreed scope show below. Later phases should be planned to deliver incremental capability.

**In Scope of standard Fast Track**

- Best practice advice on sales, marketing or services processes (select one process)
- Configuration of 4 core entities. Such as; Accounts, Contacts, Leads & Opportunities etc. (Maximum of 20 new fields across all entities) – This will align CRM with your business terminology and processes.
- Up to a day is budgeted for support with data import (up to 1K records for each Accounts and Contacts), Up to a day for training and up to 2 days for further configuration and reviews). Additional time can be purchased.

During the requirements session we will support you in understanding how CRM will be used to support the processes for the users and identify requirements to ensure CRM is fully tailored to fit your immediate and expected future business needs. Advice can be provided as required in defining processes to be supported such as best practice sales processes to ensure accurate sales forecasting. Our priority for a Phase 1 is to tailor CRM to ensure great user adoption and full alignment to your business processes and simplification of the solution to meet your immediate business needs.


The initial requirements session typically covers the following:

- Identify areas of solution to be hidden to simplify user interface
- Design relevant data model: Adapt current fields and add new fields to ensure future reporting needs and required business processes can be supported (up to 4 entities)
- Align CRM to support core business processes (one functional area eg sales)
- Agree Training and hand over needed (up to 7 hours)
- Support with Data Import if needed (up to 7 hours)

Following on from the requirements session, Cloud9 will provide a write up for review, which will subsequently provide the contractual basis for any subsequent project undertaken.

**DECLARATION:**

On behalf of both parties it is confirmed that the terms and services as described herein are acceptable to us:

<p><b>Cloud9 Insight</b></p> <p>Authorised by: Carlene Jackson</p> <p>Signature: </p> <p>Date:</p>	<p>[account name]</p> <p>Authorised by: .....</p> <p>Signature: .....</p> <p>Date: .....</p>
---	--

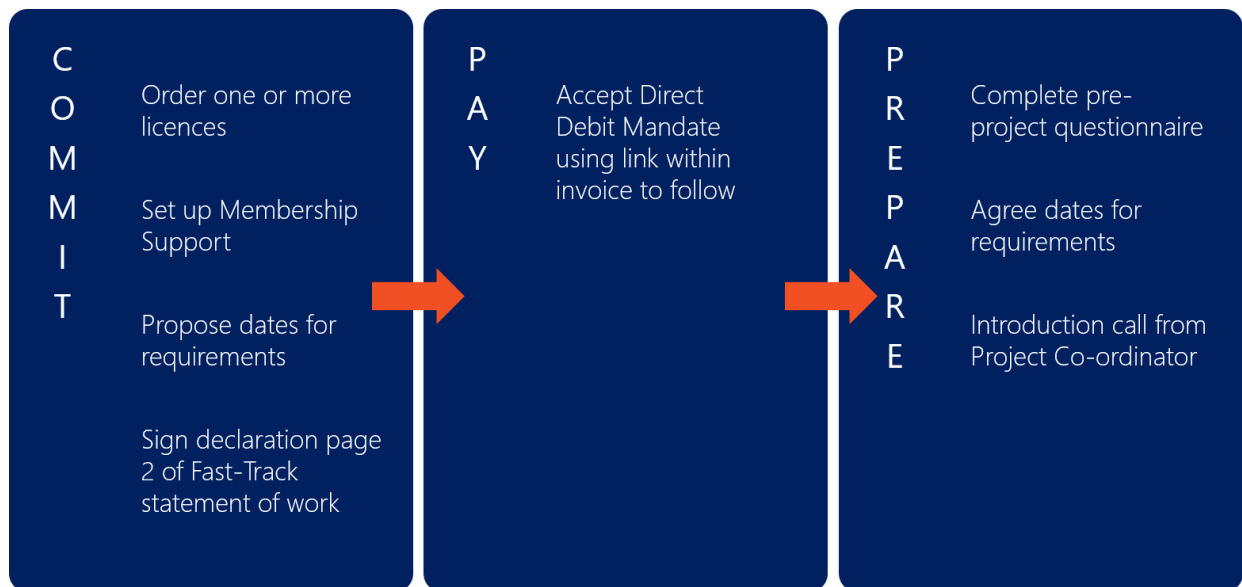
**Terms**

- All services pricing in GBP
- Costs exclude VAT
- All additional services provided on time and materials basis only, any additional time charged per hour or per day.
- All work is subject to Cloud9’s “Agreement for the supply of services” which can be found here <http://www.cloud9insight.com/terms-and-conditions>
- **Payment is required in full prior to commencement for services**
- If incurred, travel expenses will be re-charged at cost plus vat if applicable
- No obligation by either party to engage for services beyond this requirements gathering unless by mutual agreement
- Full details of support options and terms can be found [here](#)
- Global Admin access set up for Cloud9 following the provisioning of the licenses
- Please click on the following links to ensure you meet the minimum supported versions of Office and hardware that work with CRM Online: [Min Spec for CRM Online](#)

**Assumptions**

- Cloud9 Insight will be set as partner of record within CRM for 12 months following commencement of project.
- All work will be done off site unless otherwise agreed.
- No project documentation will be created.
- Subsequent phases are planned by [owner] to optimise and extend CRM capability.
- Clients take out support for at recommended minimum of 3 months from start of engagement. Time from this will be used for ad hoc training, provisioning and set up of licences etc. This can be cancelled at a months' notice.
- A day is 7 hours.

### Next Steps



## 2 Summary Scope of Project

Cloud9 have developed a Fast Track project offering to support clients that have no current CRM in place to implement Dynamics 365 on a low budget. The project is intended as a light in scope Phase 1 and further phases should be planned to ensure the highest levels of return on investment.

There are two options to commence the project:

### **Option 1 - Remote 2 hour engagement (Requirements and Design ex vat)**

The project starts with a 2 hour remote web-based requirements session where Cloud9 will support you in identifying the core data model needed to support business and reporting needs as well as key changes required to CRM to ensure is aligned to meet your immediate needs. These requirements will be written up for review and sign off before Cloud9 complete the proposed changes. The scope and priorities will be jointly managed by Cloud9 and [account name] to ensure this budget of time is met. Cloud9 recommend clients ensure a support package is in place for post project tweaks and changes, as well as assistance required to support integration with outlook and other Office 365 integrations. Additional time required can be purchased on a time and materials basis.

### **Option 1 – On-site at Cloud9 office one day engagement (Requirements and Design ex vat)**

The project starts with a one day workshop at Cloud9's offices. The session commences with a requirements gathering session where Cloud9 will support you in identifying the core data model needed to support business and reporting needs as well as key changes required to CRM to ensure it's aligned to meet your immediate needs. Following this 2-3 hour session, you are free to enjoy the sights of Brighton for a 3 hour lunch or sit with one of our consultants whilst we start to make the changes discussed. In the afternoon, we will show you the initial changes and data model in the system discussed, and identify further changes required to ensure the solution exactly meets your needs. Outstanding changes will be written up ready to be signed off by you before Cloud9 complete the final proposed changes. Data needing to be imported will be agreed and further training planned. Up to a day for each of training and data import (assumed to be up to 1K each of Accounts and Contacts only) is provisioned within the Fast Track as well as 2 days for configuration. The scope and priorities will be jointly managed by Cloud9 and [account name] to ensure this budget of time is met. Cloud9 recommend clients ensure a support package is in place for set up of licences (provisioning and set up of users etc) post project tweaks and changes, as well as assistance required to support integration with outlook and other Office 365 integrations. Additional project time required can be purchased on a time and materials basis.

## 2 Fast Track Methodology

### **A cost-effective rapid start to implementing Dynamics CRM.**

The Fast-Track CRM program is designed to quickly bring SME organisations up to speed in realising the core benefits of adopting Microsoft Dynamics CRM Online for managing and improving your customer relationships. The implementation approach used is an agile, light-phased approach to deploying the software for a set of core users within one particular line of business such as sales, marketing or service.

The approach is specifically intended for organisations looking for the most cost-effective way of adopting CRM by leveraging the expertise of Microsoft Certified Dynamics CRM consultants. The Fast-Track project offers a flexible approach that provides instant ROI and implement a technology platform that will serve longer-term business requirements.

### **Fast-Track CRM Project Approach**

[account name] have been recommended the Fast-Track option as the most cost-effective and simple approach to move forward. The program is designed to guarantee a delivery of 30 days from requirements to training. Below is what is typically included in the Fast-Track program should [account name] decide to move forward. The time will be managed to deliver on some of the following project areas:

#### **In Scope of Fast Track**

- Best practice advice on sales, marketing or services processes (select one process)
- Set up and configuration of 4 core entities. Such as; Accounts, Contacts, Leads & Opportunities etc. (Maximum of 20 new fields across all entities) – This will align CRM with your business terminology and processes. (2 days maximum)
- Up to one day for data import (1K records for each contacts and accounts only),
- Up to one day user training

#### **Additional Scope if Advanced Marketing Fast Track Module is purchased**

- 2 additional entities built with associated views and fields
- 1 day Training on Click Dimensions
- 2 days installation and setup of Click Dimensions

### **Exclusions**

Fast Track projects are designed to be light in budget and scope and therefore exclude the following areas:

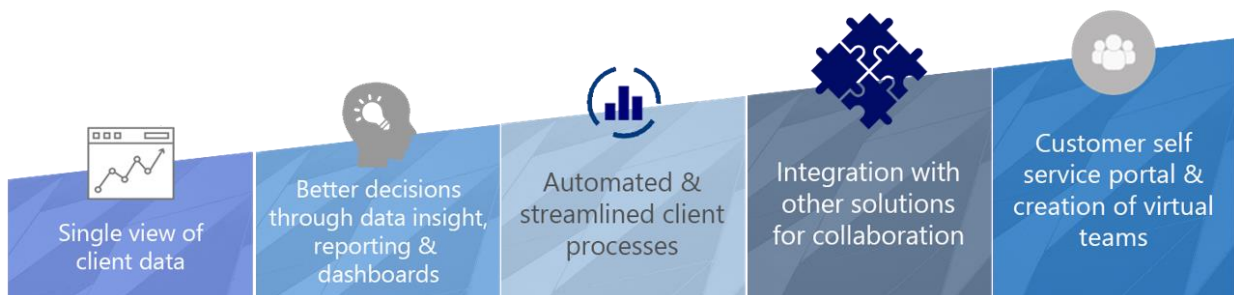
- Data migration services from existing CRM Solution
- Third-party system integration
- Custom entities to be built
- Advanced reporting using SQL Server Reporting Services
- Post-go-live consultancy support
- Third Party add-ons or integrations
- Automations and workflows

### 3 CRM Maturity Roadmap

#### Achieving CRM Maturity through Long Term Partnership with Cloud9 Insight

Cloud9 Insight recommend taking a phased approach to achieving full CRM Maturity. The Roadmap below outlines a typical phased approach to achieving a full CRM Maturity. Cloud9 work with clients over the long-term to achieve the business transformation desired at a pace that fits the company culture. We offer services by the hour and in day blocks to support on-going optimization and training of your solution to ensure a good fit for your business and great user adoption. A typical Phase 1 is focused on addressing critical business needs and simplifying the solution and aligning the solution to your business processes to secure those user adoption levels and install confidence in the platform. Later phases are tailored to achieve a greater level of maturity desired as outlined in the CRM Maturity Model below. Ask us for details of our full range of services to support your long-term maturity.

Organisations that achieve the optimum return from their investment are those that see CRM as a journey not a destination, and see CRM as supporting a business transformation. CRM should be used to support business processes and automate as much as possible, leaving more time for customer facing activities. Requirements gathered should address not only functional needs but also those to address cross department handovers – which is the area that can most affect the customer experience with your business. Consider using CRM to support and measure changes required to ensure the highest level of customer loyalty and profitability - these changes will give you the highest return on your investment. Some of these changes will include ensuring users have the best experience in using CRM to support them in doing the best they can in their role.



To achieve a greater level of maturity of your CRM solution, Cloud9 recommend the use of available add-ons such as:

- DCP for automatic proposal or document creation
- Scribe for real-time integration with other line of business applications
- Resco for advanced mobile access and remote data capture including pictures, signatures and client data
- Dynamics Portal to deliver integrated self-service portals
- Teams and SharePoint integration for document storage and collaboration
- Telephony integration
- Advanced Marketing using ClickDimensions for email marketing, web-form integration, surveys and other advanced marketing features



## 4 Why Cloud9 Insight

### CRM Leaders in UK

Cloud9 Insight were awarded the 2015 Presidents Club recognition, meaning we are in the top 5% globally in delivering successful CRM projects (measured by customer satisfaction surveys, references and other performance related metrics).

### High Calibre Consultants & Long-Term Dedicated Project and Account Management Team

Cloud9 consultants are recruited for their strong business acumen and work closely with clients to ensure you get the most from your investment in aligning the solution to support your business strategy and also ensure great user adoption. We have long term relationships with all our clients and continue to support them well beyond an initial implementation, a credit to our success in our focus on your long-term objectives. We have outstanding training capability and work closely with you to continuously help you be self-sufficient with enhancing your solution yourself if desired and supplementing your own internal capability and bandwidth where helpful. All consultants are certified in recent qualifications and the Cloud9 group of consultants offer a wide range of experience across many different industries and verticals.

### Pragmatic Collaborative Approach

Cloud9 Insight adopts a pragmatic approach to working with clients and seek where possible to minimize project costs. This is done by one or more of the following approaches:

- supporting clients with a knowledge transfer approach
- create a transparent working relationship to support intelligent decision making about project effort that makes good business sense
- supporting clients in defining scope to deliver a project to an agreed budget, and phasing requirements in a way that makes business sense for the client to achieve a quick return on Investment.

### Support Client's Vision

Cloud9 Insight is recognised by their clients for their strength in capability in defining and delivering a mature CRM vision for clients. CRM will allow you to streamline and automate your business processes. For clients that are seeking the highest level of CRM maturity we achieve this through implementation of client portals and integrated website touch points with your customers or partners. Well-designed dashboards and real time reporting will support better decision making.

## 5 Additional Services Provided by Cloud9 Insight

### **Business Central and Office 365 and Power BI**

Cloud9 offer additional services around extended Microsoft Cloud solutions including email migration services for clients moving to Exchange online – as part of Office 365, or the new Cloud based Financials and ERP solution. We also have dedicated SharePoint consultants to address your requirements around document management and can provide other professional services to support your adoption of Teams, PowerBI and more traditional applications of the Microsoft productivity suite.

### **CRM Admin & User Training**

Cloud9 are passionate about supporting clients with improving user adoption and helping clients get the most value from their investment in IT. We tailor all training to the client's processes and application to ensure training is relevant to the user's role. We can also provide advanced user and Administrator training. Cloud9 also offer public training on CRM full details can be found here [Cloud9 Public Training](#)

### **User Adoption**

User Adoption is the single most significant factor affecting success of your CRM Project. To ensure your organization enjoys the best level of user adoption we recommend planning 1-1 sessions with users post training. Typically these sessions are 1 hour in duration and designed to support the user in addressing any early training and support issues that may otherwise impact the successful adoption of CRM. These sessions are a combination of training and consulting to personalize CRM to the users unique preferences, and unique views and dashboards that will support better adoption of CRM. These sessions should be planned within a week of the initial training provided and can be offered on scheduled at short notice and throughout the lifecycle of using CRM. They are included free within the Membership Support package for all nominated users within the support package.

### **Membership Support**

Cloud9 offer exceptional levels of membership support which cover usual break-fix support as well as minor tweaks and changes as well as unlimited training. Clients also enjoy annual Optimization services which give you continuous access to our experienced consultants to support identification of additional ways to extend the value of your use of Dynamics within your organization or to take advantage of new features within recent upgrades of Dynamics 365. We are so confident in the great value that our support offers that we offer the flexibility to cancel support with a months' notice, although its rare for any client to cancel.

### **CRM Add-Ons**

Cloud9 are experienced with many of the popular CRM Add-ons developed by Microsoft Dynamics CRM Partners to enhance your experience of using CRM. These cover areas such as advanced marketing using ClickDimensions, mobile access using Resco, Accounting integration, address validation using Post Code Anywhere, automatic document creation using DCP, Dynamics portals, CRM Add-ons for CTI and many more.