CRM — IMPLEMENTATION ROADMAP

EXPLORE
- Business Context
- Business Needs
- Business Processes
- User Activities
- User Roles
- Business Rules
- Workflows
- Metadata & Values
- Legacy Tools
- Documents
- Reports

PLAN
- Implementation Approach
- Project Schedule
- Project Resources
- Business Settings
- Process Modifications
- Numbering Series
- Customisation
- Integration
- User Training
- Communication of change
- User Support

CONFIGURE
- Server, Database
- System Setup
- Users & User Groups
- Security Profiles
- Metadata Settings
- User-Screen Mapping
- Numbering Series
- Data Migration
- Document Configuration
- Leads, Activities
- Products, Units, Groups
- Price Lists, Discounts
- Sales Quotas/Orders
- Service Activities
- Customer Contracts
- Sales Segments
- Marketing Campaigns
- E-mail Templates
- Sales Brochures
- Competitors

TRAIN
- Communicate change
- End Users
- Key Users
- Admins

DEPLOY
- Correct Business Settings
- Migrate Data
- Approve Configuration
- Sign Off Acceptance
- System Roll Out
- User Support
- Close Project

Aotea STUDIOS
www.aoteastudios.com