

# Dynamics 365 Customer Engagement Assessment

## Assessment Program

**Duration:** 3 days

**Focus Area:** Business/IT Alignment

### Overview

Gain valuable insight into the health of your Dynamics 365 Customer Engagement instance by proactively diagnosing issues and risks. Receive guidance to improve the health, performance and stability of your Dynamics 365 Customer Engagement instance.

### Objectives

- Perform a comprehensive review of your Dynamics 365 Customer Engagement instance.
- Identify key areas of improvement in the instance that includes general performance, best practices, configuration and settings
- Obtain a Health Score for your instance, and next steps towards improving the health and stability of your Dynamics 365 Customer Engagement instance.

### Methodology

#### 1. Initiate

The assessment is initiated with a **Kick off Meeting**. We will be providing an overview of the Assessment and will be going over the following:

- Introductions
- Roles & Responsibilities
- Questionnaire

During this phase, we aim to understand your current business processes and any specific concerns you may have with your Dynamics 365 Customer Engagement instance. We also provide you with a Questionnaire that needs to be answered to understand functions and areas that cannot be detected using telemetry.

#### 2. Analysis

During this phase, we will use output from Dynamics 365 telemetry and questionnaire responses, to analyze and determine the health of your instance.

#### 3. Review

During this phase, we review the results with you. We provide you with an overall Health Score for your environment and discuss further recommendations to improve health and stability going forward.

### Key Takeaways

- A report outlining the overall Health Score with detailed information on any issues found with respect to performance, configuration and best practices for your Dynamics 365 Customer Engagement instance.
- Additional services we provide, that can help mitigate some of the risks outlined

### Agenda

The assessment runs for a total of 3 days.

**Day 1 :** Kick Off & Questionnaire hand off

**Day 2 :** Data Analysis by Microsoft

**Day 3:** Final Presentation & Discuss Next Steps

## Agenda details

### Day 1: Kick Off

- Kick off meeting
- Discuss Assessment Overview
- Review Roles and Responsibilities
- Receive Survey Questionnaire to be completed

### Day 3: Closeout

- Review Final Presentation outlining Health Score, Risks & complexities
- Discuss Next Steps

### Day 2: Analysis

- Microsoft Engineer will analyze the data collected
- Customer to provide responses to the Questionnaire back to Microsoft
- Engineer is available to answer any additional questions

## Pre-requisites

**The following pre-requisites should be made available as part of the engagement:**

### Identify Key Resources

We recommend identifying key resources to work on the engagement. Key resources include Solution Architect, Database Administrator, Infrastructure Engineer, Developer, IT Manager and any other relevant resources. The assessment will be managed remotely, typically requiring 4 to 8 hours of customer time in total.

## For More Information

Contact your Microsoft Account Representative for further details.