

A Smooth and Complete CRM Online Deployment

Ready to leverage CRM Online to grow your business, enhance customer satisfaction and streamline your sales lifecycle? We can't stress enough how a good deployment is key to getting the most out of your customer relationship management tool.

With the RapidStart CRM deployment add-on, you'll be ready to leverage CRM Online faster, with more success and with no hassle.

Here's the 6-step process we'll go through to deploy your Dynamics CRM Online instance.

Step 1 Setup

Once you've opted for CRM Online and RapidStart CRM, we get to work. Sit back and relax, we take care of everything during this first step. We'll deploy the following components to your Dynamics CRM Online instance:

- RapidStart CRM add-on, which will help us customize your environment
- Integrated Training add-on, which gives access to training videos to all your users
- Social Insights add-on, an app providing information about potential customers

When everything is installed, it's time to get started with the customization of your environment!

Step 2 Entities and Fields

To make the best use of your CRM Online, you need to tailor the solution to your business. During this step, we take care of building the entities that works for your business. We will:

- Modify the relevant entities to fit your requirements
- Remove fields not relevant to your organization
- Rename fields to fit your business taxonomy
- Add missing fields needed by your company

Rather than modify your business to fit CRM, we'll make CRM fit your business.

Step 3

Guided Process

Guided Process is the information bar atop the Leads & Opportunities records. It provides a roadmap to your users as to what to do next. In this step, we'll customize the Guided Process to:

- Apply your own logic as to what, when and why things happen
- Give guidance to your users on the steps needed with leads and opportunities

Once completed, your business logic is applied to your CRM Online instance.

Step 4

Security

Not every user should be allowed to access or edit data in CRM. Roles and permissions need to be configured. This is the step where we:

- Create the users profiles of your organization
- Configure each role with the right Read/Write permissions
- Assign roles to users

You're almost ready to go from now.

Step 5

Import Data

To get you started on the right foot, we need to push your existing data into Dynamics CRM Online. In this step, we:

- Create customized import templates for your Leads, Contacts and Accounts
- Map data to the Excel Spreadsheets
- Upload the templates to be processed for import

On Day 1, your team will have access to your complete set of customer data right in CRM Online.

Step 6

Go Live

Before you start using CRM, we need to complete a couple more steps. We will:

- Install the Outlook Connector for Dynamics CRM Online
- Deploy the CRM Mobile apps

You are now ready to use all of CRM Online capabilities.