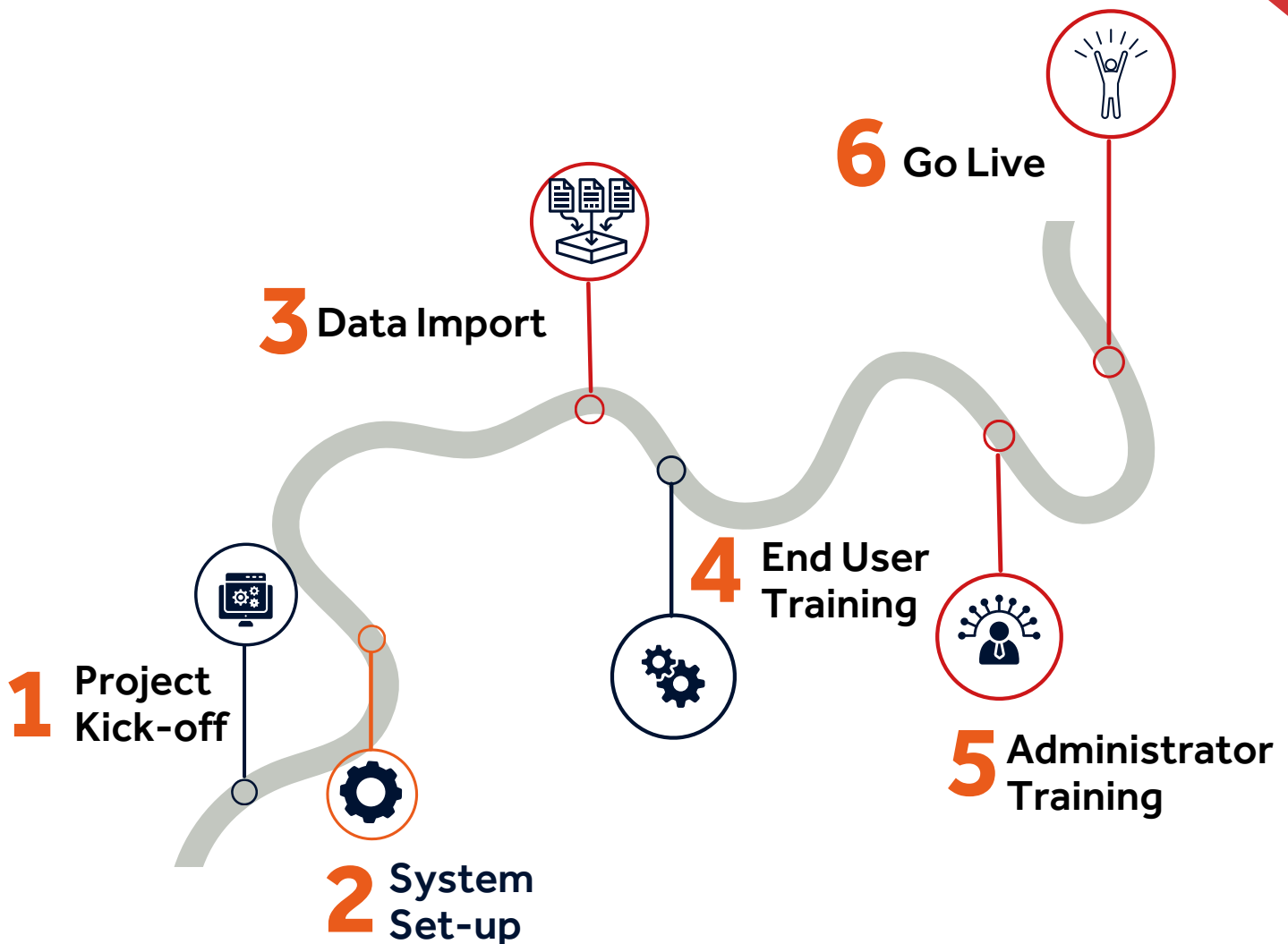# Xperience

Quick Start... How does it work?

At Xperience we want to take the complexities and high costs out of implementing CRM systems. Our Quick Start Implementation plan means that in as little as **5 days** you can be up and running on your new Dynamics 365 CRM solution.

So what exactly does our Quick Start Implementation Journey look like?

6 Go Live

3 Data Import

4 End User Training

1 Project Kick-off

5 Administrator Training

2 System Set-up

Ok, so I understand the plan, but tell me more about the tasks? Exactly what is involved?

1 Project Kick-off

It is time to get started and meet your CRM team. During our virtual kick off meeting using Microsoft Teams technology, we will introduce you to the consultants who will take you through your project. There will be time for introductions and who is who. We want to get to know all of your team as much as we want you to know ours! This call will be to walk through your requirements and project expectations. We like to set measurable goals which are reviewed throughout your project. Alongside your expectations and objectives we aim to ensure these are reviewed at the end of the project, that way you know the project has been a success for your business. We will talk you through how the program will work and ensure you are fully aware of all tasks ahead and who needs to do what. Getting this all set at the start will be key to success!

2 System Set-up

Step 2 is for Xperience. So, you can sit back, relax and start thinking about all the great things you will get from your new solution! After project kick-off, we will schedule time for the team to commence working in the background to start setting up your solution. We will need a few pieces of information on your business and users to get us started and we will cover that at project kick-off.

3 Data Import

This is where you come in! In order to ensure you have the information you need, we will require your system to have your data. Data import templates will be provided to you and the Xperience team will walk you through what is needed. We will explain all the tables making it as easy as possible for you to work through. Your team will then prepare the templates with your data ready for Xperience to import. We do know this part can be quite daunting and we can provide extra assistance here if you need. Our team are happy to chat through our additional options around data migration and the benefit these could bring to your project.

4 End User Training

It's time to get training! Get your key team members together for your training session. During this session, we will be going through the CRM basics and introductions focusing on the look, feel and general system navigation. Once the system overview is complete it will be on to the core data with a focus on your sales and business process within the system and taking you through the dashboards and reporting functions.
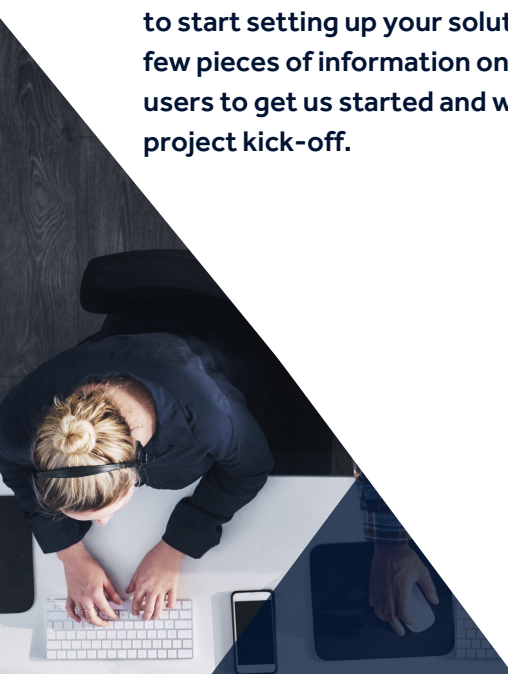
5 Admin User Training

It is key for us that you feel you can manage, administer and control your solution. We would always recommend you allocate two members to admin training. This is the session where we will walk you through your basic user set-up, security and general system administration.

6 Go Live!

Now it's over to your team to take some time to review everything which has been covered in the core system training. Familiarise yourself with the solution and start testing things out. Put the system through its paces and ensure you have everything you need to make it a success.

This is it, time to get started. We are there for those last minute questions and to "hold your hand" through your first day of working on your new CRM solution. Once finished, we will get you ready for handover to our dedicated support team. Walking you through the support desk process and making sure you have access to the tools you need to efficiently log and monitor any support queries you have.

Xperience

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