



## COMPUTER TRAINING

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### CRM

Course No. 80054

2 Days

#### Target Audience:

This course is an advanced training workshop that focuses on the Project Management area of Microsoft Dynamics Sure Step 2.0. It is intended for Project Managers and Implementation Consultants responsible for managing Microsoft Dynamics CRM implementations.

#### Pre-requisites:

Before attending this course, students must have the following pre-requisites:

- Completed Course 80047, Using Microsoft Dynamics Sure Step 2.0, or have a working knowledge of Microsoft Dynamics Sure Step 2.0.
- Sufficient knowledge of Microsoft Dynamics CRM to successfully complete the case study.

#### Purpose:

After completing the course, students will be able to examine how to prepare and plan for each implementation phase; select, plan, and deliver Sure Step's decision accelerators; define the scope of the project; guide the customer towards the most efficient implementation process and project type; produce time and cost estimates for the project; plan the resources for the project and plan for risks; create a training plan; understand the process of Sure Step's Detailed Business Analysis workshops; identify and document functional requirement Fits and Gaps; control scope creep by implementing proposal management; plan early for the Deployment phase by creating a deployment plan; learn how to use Sure Step's Solution Design Documents; examine Performance Reporting and Status Reporting; plan and perform testing activities; conduct a tollgate review at each phase; prepare and conduct the cutover from the non-production to production environment; identify how to work towards project closure.

# Project Managing Microsoft Dynamics CRM Implementations with Microsoft Dynamics Sure Step

At the end of the course the delegate will be able to complete the following:

## Introduction to the Microsoft Dynamics Sure Step Case Study

- This module provides a brief introduction about this two day course, which begins by reviewing and summarizing some of the essential concepts of Microsoft Dynamics Sure Step.
- Overview of Microsoft Dynamics Sure Step
- Introduction to the Case Study
- Lab: Create a Test Project
- Lab: Import the Sure Step Project File for the Case Study

#### Skills:

- Identify the essential components of Microsoft Dynamics Sure Step.
- Understand the case study, its storyline, and the role students play in the fictitious Microsoft Dynamics CRM implementation.
- Identify the course material and supporting documents that are used throughout the case study.

## Project Initiation and Planning in the Diagnostic Phase

- This module examines the Diagnostic activities that support and reinforce the sales activities and prepare for the upcoming project.
- Preparing for the Diagnostic Phase
- Delivering Decision Accelerators
- Planning the Project
- Managing the Project Proposal
- Lab: Internal Briefing Meeting
- Lab: Review Preliminary Project Information
- Lab: Select Decision Accelerators
- Lab: Class Discussion
- Lab: Requirements and Process Review
- Lab: Fit Gap Solution Blueprint
- Lab: Scoping Assessment
- Lab: Define the Project Type for the Case
- Lab: Create the High-Level Project Plan
- Lab: Class Discussion
- Lab: Create the Statement of Work (SOW)
- Lab: Present the Statement of Work

#### Skills:

- Prepare and plan for a Diagnostic phase.
- Decide, plan, and deliver the decision accelerators.
- Identify and define the scope for the project based on results from the decision accelerators.
- Guide the customer towards the most efficient implementation process and project type.
- Produce time and cost estimates for the project.
- Plan the resources for the project.
- Plan for risks.
- Create a project proposal.

## Project Planning and Execution During the Analysis Phase

- This module examines the activities required to initiate and effectively plan the entire project.
- Project Planning and Communications Management During the Analysis Phase
- Conduct the Solutions Overview
- Detailed Business Process Analysis
- Fit/Gap Analysis
- Issue Management
- Lab: Prepare for the Kick Off Meeting
- Lab: Conduct the Kick Off Meeting
- Lab: Class Discussion – Necessity of Solutions Overview
- Lab: Create the Training Plan
- Lab: Review Workshop Reports
- Lab: Complete the Functional Requirements Document (FRD)
- Lab: Identify Gap Information
- Lab: Identify Integration and Interface Requirements
- Lab: Identify Issues
- Lab: Class Discussion – Identify Changes
- Lab: Document Changes and Update the Project Plan

#### Skills:

- Prepare for and conduct the Kick Off meeting with the customer.
- Determine if key user training prior to the Business Requirements Workshops is necessary.
- Create a training plan.
- Understand the process of the Detailed Business Analysis.
- Identify and document the gaps in the workshop review documents.
- Examine how to handle issues in the project.
- Control scope creep by implementing proposal management.
- Finalize the project plan to reflect changes in business requirements.

## Project Execution and Monitoring During the Design, Development, and Deployment Phases

- This module examines the activities that a Project Manager must execute and monitor when implementing Microsoft Dynamics CRM.
- Overview of the Design, Development, and Deployment phases
- Project Planning
- Solution Design
- Project Performance and Status Reporting
- Testing
- Tollgate Review
- Go-Live



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- Lab: Create the Deployment Plan
- Lab: Update the Project Plan
- Lab: Create a Fit Design in the Functional Design Document (FDD)
- Lab: Create a Gap Design in the Functional Design Document (FDD)
- Lab: Create a Solution Design Document (SDD)
- Lab: Class Discussion
- Lab: Review the Consultant Status Report
- Lab: Create the Project Status Report
- Lab: Unit and Function Testing
- Lab: User Acceptance Testing
- Lab: Prepare the Tollgate Review
- Lab: Create a Go-Live Cut-over Plan

**Skills:**

- Create a deployment plan.
- Use solution design documents.
- Create Performance Reports.
- Create weekly Status Reports.
- Plan and perform testing activities across different phases.
- Conduct a Tollgate Review.
- Prepare and conduct the cutover from the non-production to the production environment.

## Project Closure During the Operations Phase

- This module examines the final activities required to close out the project and transition the solution and knowledge to the customer.
- Quality Management
- Project Closure
- Celebrate Project Completion
- Lab: Complete Pending Items
- Lab: Class Discussion – Conduct Lessons Learned Meeting
- Lab: Class Discussion – Conduct Close-Out Meeting

**Skills:**

- Appreciate the importance of quality management during the Operations phase.
- Understand the necessity of project closure.
- Identify how to work towards project closure.

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## PARTICULARS

**Cost:**

For the latest available price, please see the course page on **www.f1comp.co.uk**, or call 01225 336096.

**Numbers:**

Maximum of 6 people on each course at F1's training facilities in London and Bath