## Sopra Steria Dynamics 365 Customer Engagement (CE) Health Check

Optimising Dynamics 365 (D365) CE for peak performance and strategic alignment

A Dynamics 365 CE Health Check is a review of your current setup to identify any issues with performance, security, and best practices, ensuring the system is running efficiently and is prepared for future growth.

### Our holistic approach

#### Solution design analysis

Evaluate how well Dynamics 365 CE supports business processes and strategic goals.

#### Technical design and management

Assess environments, configurations, customisations, automation, reporting, cost optimisation, and update readiness for optimal performance.

#### System integration review

Review integration points across Dynamics 365, SharePoint, Microsoft 365, and third-party systems to ensure seamless data flow and operational efficiency.

# **Health Check** INI **Assessment** 5 - 10 Days

#### Security assessment

Comprehensive review of security roles, access controls, and data protection regulation (GDPR) compliance to secure critical data.

#### User adoption and experience

Measure user engagement, solution effectiveness, and recommend training improvements.

#### Data quality and governance

Inspect data integrity, master data management, and data governance practices.

## **Key Outputs:**



#### **Quick wins**

Immediate improvements to enhance system efficiency





#### Roadmap

long-term optimisation

#### Contact

**Book your D365 Health Check** 

Get in touch!



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Connect with Rhoddy

#### Perfect for:

- · Teams who are ready to scale but unsure if their Customer Relationship Management (CRM) can
- · IT Leaders who want clarity before making big platform decisions
- · Businesses that want to maximise Return on Investment (ROI) from D365 Compliance
- · Governance teams that need a security sanity check







