Targeted towards Dynamics Administrators and IT support, and organizational leadership, this tip sheet contains six actionable strategies to improve management of the Dynamics environment, which will in turn increase ROI and User Adoption.

To view additional webinars and educational content visit, WWW.CRMUG.COM.

ABOUT CRMUG:

User Group for Dynamics 365 & CRM: Bringing D365/CRM Users Together to Exchange Knowledge and Experience Success

D365UG/CRMUG is a community of professionals, like you, using Microsoft Dynamics 365/Microsoft CRM. The user group brings users to the forefront of technology problem solving by allowing them to share their ideas and solutions. Tens of thousands of users call this community home and utilize the following resources to exchange knowledge, exhibit leadership, explore solutions and expand their networks:

- User-led virtual training sessions
- Local User Group Meetings
- Online Q&A Forum
- Advanced workshops (Academy)
- In-Person Conferences and Events

D365UG/CRMUG is an important information source for all users of Microsoft Dynamics 365/Microsoft CRM. Coupled with support we can provide; you will experience success by getting involved with D365UG/CRMUG. The cost-effective organizational membership allows all Microsoft Dynamics users in your organization to get involved and experience the value of a community powered by users, for users.

Join Today
**STEPS TO MANAGE YOUR DYNAMICS 365 & CRM ENVIRONMENT**

1. Develop a strategic roadmap
2. Plan ahead to balance control and flexibility
3. Create a development backlog
4. Prioritize and groom the backlog
5. Plan a release
6. Communicate changes to users

### DEVELOP A STRATEGIC ROADMAP

- High level priorities for CRM for next 12-18 months
- Sets milestones for the team
- Baseline to measure against
- Use for resource planning and budgeting
- Helps align with integration partners

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<td>PAYMENT GATEWAY INTEGRATION</td>
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<td>Customize reminder emails for member retention Integrate with QuickBooks</td>
<td>Multiple Login</td>
<td>Scheduling Integrated Online Store</td>
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2. PLAN AHEAD TO BALANCE CONTROL AND FLEXIBILITY

- Which changes require a release?
- Release = customization publish or backend code change
- Impacts downstream partners
- Lookups: Campaign types, Goal types, Opportunity lost reasons

3. CREATE A DEVELOPMENT BACKLOG

- All changes requiring development
  a. Large roadmap items (needs, vague requirements initially)
  b. Small enhancements (task-y)
  c. Defects
- Tools: Excel/Google Docs, Version One, JIRA, Rally Software

4. PRIORITIZE AND GROOM THE BACKLOG

- Highest priority items to the top.
- Rocks and sand prioritized together. Releases need a balance of both.
5. PLAN A RELEASE

- Select candidates for the release based on priority
- Development calculates resource capacity for the release
- Development provides estimates for each release candidate
- Business “shops” from the list of release candidates, spending the capacity

6. COMMUNICATE CHANGES TO USERS

- Release email
  a. Briefly describe key changes with small screenshots
- Training calls
  a. 1 hour conference calls offered several times over the week
  b. Quick demos for new enhancements
- Reference guides and online demos
  a. 1-2 page functional quick reference guides (e.g. Navigation guide, Advanced Find, Managing calls and tasks)
  b. 1 min Captivate online demos

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D365UG/CRMUG Members benefit from user-led and produced training on Microsoft Dynamics 365 & CRM. In addition, Membership includes valuable networking and collaboration opportunities both virtually and in-person.