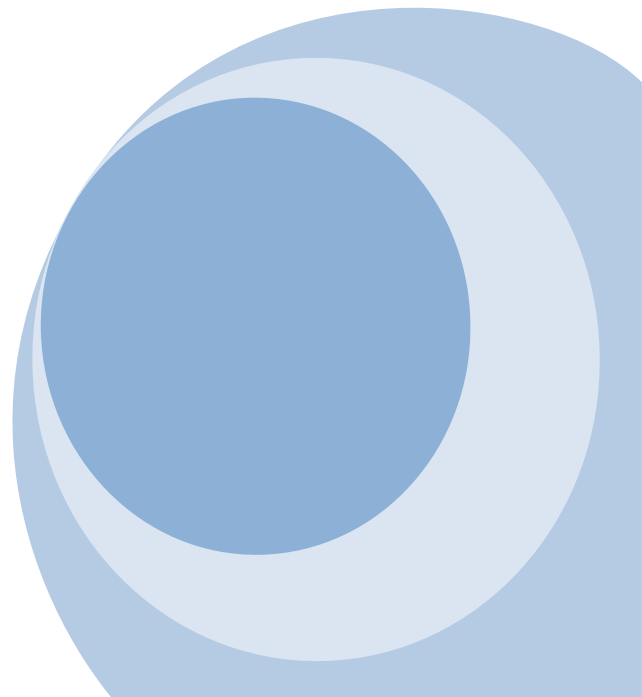


Optevia 4D Project Methodology

Overview

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Optevia's project methodology is defined by four stages that will lead an organisation through a disciplined implementation approach, known as the Optevia's 4Ds - Discover, Design, Develop and Deploy. The approach is supported throughout by the Microsoft Dynamics CRM Implementation Toolkit (ITK) - a set of tools designed by Microsoft specifically for Microsoft Dynamics CRM projects and based on CRM industry best practice.

All of Optevia's Microsoft Dynamics CRM projects have been delivered using this tried and tested methodology. The 4D methodology can be summarised as follows:

Discover is the first stage

Optevia works with its customers in partnership to understand their business, their existing technology, and their CRM challenges and opportunities; over and above the level of understanding gained at the time of first engagement. Together with the customer, Optevia determines the best approach for applying Microsoft Dynamics CRM to deliver the desired business benefits. Through this collaborative process strategic and tactical plans are developed to ensure these benefits are achieved.

Key Discover outputs (products) can include:

- A project definition document
- An implementation team definition document
- A business & technical discovery document

Design is next

At this point Optevia works with the customer to discuss how Microsoft Dynamics CRM will be crafted to address specific business requirements. During this phase, the easily customisable user interface of Microsoft Dynamics CRM supports an iterative, rapid prototyping approach which ensures the delivery of a complete, scalable solution, one that integrates with a customer's current environment and maps uniquely to their business initiatives.

Key Design outputs (products) can include:

- Requirements analysis document
- Mapping business requirements and processes to Microsoft Dynamics CRM
- User interface design prototypes
- Data design
- Integration design
- Security design
- Workflow processes
- Legacy data conversion
- Testing
- Deployment support requirements

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Develop is the third stage

With requirements, approach and architecture clearly defined, Optevia applies its our depth of public sector experience and Microsoft Dynamics CRM technical know-how to develop an integrated service orientated solution.

Key Develop outputs (products) can include:

- Installation of all software, (Microsoft Dynamics CRM & other Microsoft pre-requisite software)
- Configure - business units, users, teams, security roles, system settings
- Customise the UI
- Migrate data
- Integrate with other systems
- User acceptance testing
- Reporting modifications

Deploy is the concluding stage

With the Microsoft Dynamics CRM solution implemented, Optevia will provide post transition training, support, help-desk services and systems operations.

Key Deploy outputs (products) can include:

- Train end users and administrators
- Bring into production (go live). Verify all hardware and software and test connectivity for every user
- Transition to support
- Conduct project closure

Together Discover, Design, Develop and Deploy make up the Optevia advantage in delivering successful Microsoft Dynamics CRM solutions to the public sector.

A typical Microsoft Dynamics CRM installation

The following chart illustrates the key tasks and milestones in each phase of Optevia's 4D project methodology that need to be completed to ensure a successful Microsoft Dynamics CRM implementation.

Discover	Project Definition CRM Concepts Mapping Guide Project Plan Review Source Data Structure Key Functionality Demonstrations
Design	Set Up Development Environment Reach Agreed Decision for Contacts, Accounts Relationships Prototype Review Session 1 Prototype Review Session 2 Business Requirements to CRM Mapping Document Source Data Mapping Document Prototype Review Session 3 Prototype Review Session 4 Detailed Data Planning document Report Designs Security Design Integration Design Detailed Data Migration Plan Testing Plan Workflow Design
Develop	Client Responsibilities Install Production System software Configure Production system Test Data Migration Test Integration User Acceptance Testing Review and resolve issues from UAT Modify Reports Develop Training materials
Deploy	System Administrator Training Trainer Training Core System Data Migration Support Go Live

Typical project plan pre-requisites:

- A dedicated full-time project manager from the customer
- A dedicated a full-time Microsoft trained technical consultant
- Assured access to the key information required to perform the implementation, at all stages of the 4D methodology
- Appropriate customer representatives available for all the key stages of the project plan

