

## Planning Microsoft Dynamics CRM 2011

**Planning Microsoft Dynamics CRM**, like any enterprise-wide software, is a significant task for an organization. This guide is written for the team of people responsible for planning Microsoft Dynamics CRM, and **provides information and** tools that are needed to design a successful implementation. In smaller organizations, several roles may be filled by one person. In larger organizations, each role may be divided among several people. These roles include the following:

**Business managers:** Responsible for determining how your business will use Microsoft Dynamics CRM. **This includes mapping your processes** to Microsoft Dynamics CRM, deciding on default values, and identifying any required customizations.

**Customization technical staff:** Responsible for implementing the planned customizations.

**Network technical staff:** Responsible for determining how Microsoft Dynamics CRM will be installed on the network.

**Project manager:** Responsible for managing an enterprise-wide implementation project.

Organizations that implement Microsoft Dynamics CRM software may use the services of an **independent software vendor (ISV)** or value-added reseller, a consultant, or other organization that is partnered with Microsoft and will help you with implementing and maintaining your Microsoft Dynamics CRM installation. Because of this assumption, there may be references in this guide to these "partners" who are expected to provide services to you.