Internal CRM Healthcheck – Survey

Please answer the following questions to help our team assess the health of our CRM system

Questions (1= Very Dissatisfied 5=Very Satisfied)	GROUP A	GROUP B	GROUP C	GROUP D
Overall CRM Satisfaction				
Is the system meeting your business needs?				
Are users accessing as often as expected? Ie. Daily/Hourly?				
Are users comfortable and proficient in their use?				
Do you trust the accuracy and quality of data?				
Have new users been onboarded and trained?				
Total				
Overall CRM Performance				
Are opening screens and bookmarked pages opening fast enough?				
Are queries returning results fast enough?				
Are reports running fast enough?				
Are you able to save emails from the Outlook App into Dynamics 365 in a reasonable time?				
Have there been a high number of support requests?				
Total				
Data Quality and Accuracy				
Are reports accurate and trusted?				
Are metrics in dashboards accurate and trusted?				
Is data being updated by users according to business process needs?				
Is data from other systems (integration) being shown in an accurate and timely manner?				
Total				
CRM Functionality				
Do screen layouts and fields match business needs?				
Are visuals used to provide quick analytics?				
Is mobile access needed and needs being met?				
Are external portals functioning as expected?				
Are there exports to Excel or imports from Excel that have become mission-critical (workarounds)?				
Total				