

News, views and more from the Australian CRM specialists

CRM Opinion

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A guide to upgrade success



Ensuring upgrade success starts long before you touch any software.

The first step is to be clear why you are considering an upgrade at all. We've identified [4 main reasons companies upgrade their CRM](#) - which ones apply to you? Once you know what's driving the upgrade, it's easier to scope. And CRM upgrades, like any other project, need a solid scope.

Use our [8 tips for CRM upgrade success](#) to plan and implement your next upgrade project.

Upgrade Readiness Workshop

Pros and cons of upgrading CRM - tell us what you think

More functionality, continued support, minimising risk by staying on a stable system. There are pros and cons to upgrading, but what's most important to *you*?

[Complete the Opsis Upgrade Survey](#) and tell us what *you* care about.

We'll be publishing results in May, so you can see how you compare to your peers. Plus, we'll be giving some lucky entrants Gold Class movie passes, so why not take the survey.

Microsoft Dynamics CRM support for various versions

An [Upgrade Readiness Workshop](#) can help you identify pinch points and other obstacles *before* you upgrade.



Opsis perform a trial upgrade of your system, then spend half a day with you reviewing:

any customisation which fails to upgrade
new features which can benefit your business
changes to the interface

[Ask us about an Upgrade Readiness Workshop](#) for you and your team.

While there's no need to upgrade to the latest version of CRM straightaway, it's a good idea to keep an eye on support levels for your version.

There's nothing worse than saving a few dollars by not upgrading, then when your system crashes, finding no one can help.

[Check current and future support for your version of Microsoft Dynamics CRM.](#)

Could these new features in Dynamics CRM 2015 help you?



Wondering whether to upgrade? The [Opsis Administrator's Guide to CRM 2015](#) may help.
