Capgemini

RAPID RESULTS

Dynamics 365 for Sales

DREAM **BIG**

START **SMALL**

DELIVER **FAST**

RAPID RESULTS

We have developed 'Rapid Results' offering to enable our clients to take advantage of the core 'out of the box' capabilities of Dynamics 365 for Sales, to deliver immediate results and to provide a platform upon which additional capabilities can be added in the future. All this can happen within a short timeframe at a fixed cost, and without the risk associated with a lengthy and complex implementation.

Following recognised industry best practice, Rapid Results focuses on delivering the base capability in the first stage of a Customer Engagement project. This approach provides a platform for future improvements, allowing additional capabilities and customisations to be added as needs require.

6-week duration   **$65,000 (ex. GST) fixed cost**

OBJECTIVE

Enable your sales force to be efficient by streamlining the sales process and empowering them with insights to focus on right deals at the right time.

"*How you sell matters. What your process is matters. But how your customers feel when they engage with you matters more.*"

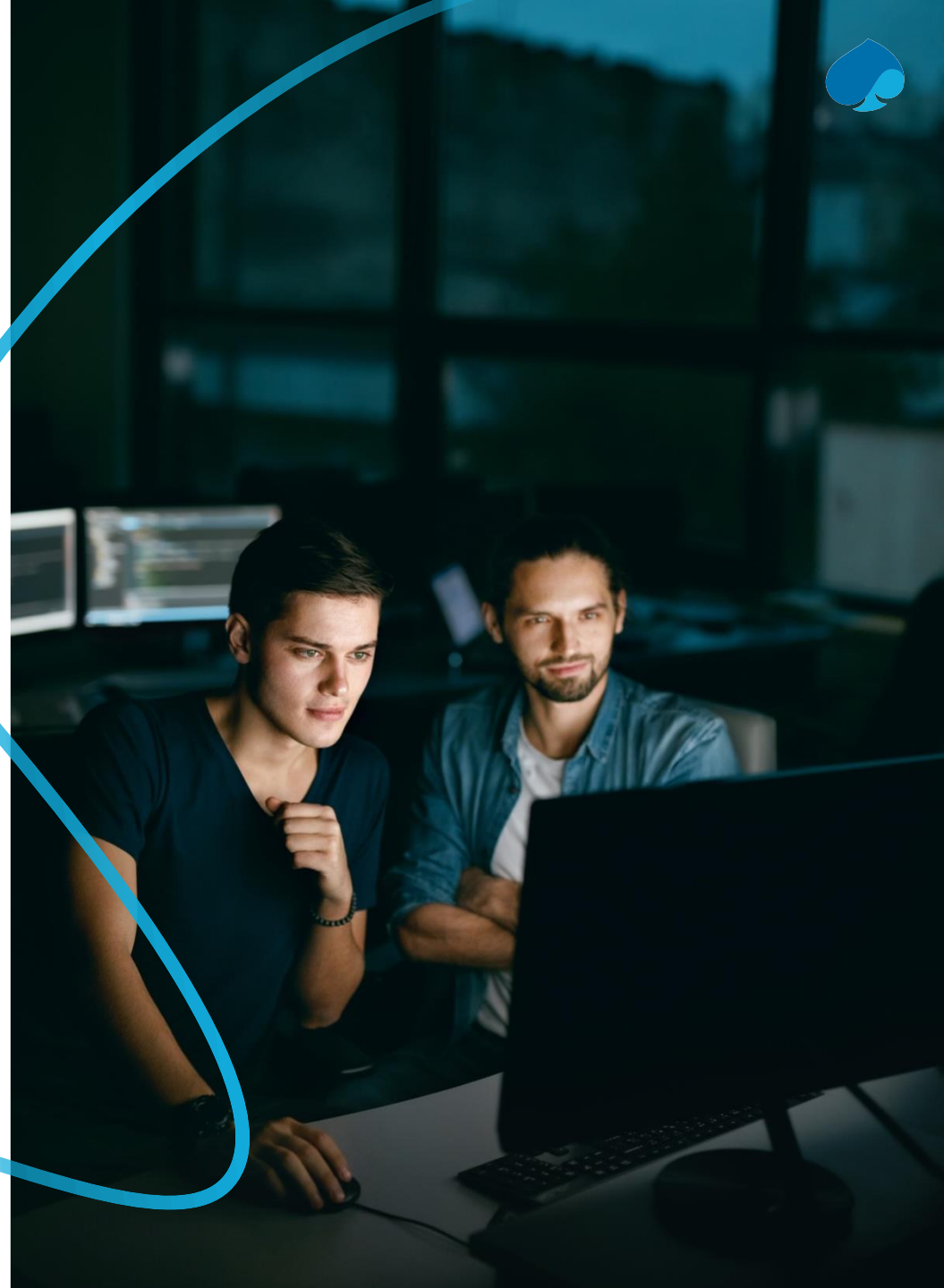Tiffani Bova

MODERNISE SALES PRODUCTIVITY

Sales Excellence

Empowering your sales team through guided sales processes, enabling productivity and the baseline to measure results.

Sales Performance

Powerful dashboards and reporting available at your fingertips, giving you accurate insight into your sales performance.
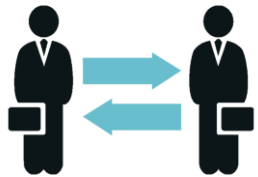
Embedded Intelligence

Actionable intelligence through recommended sales actions, auto capture and tracking of emails and email engagement analytics, so people are directed to what's important so they close opportunities faster.

SALES CAPABILITY

Intelligence and Insights

Dynamics 365 Sales Model Driven Business Application

	Call Intelligence	Predictive Forecasting	Sales Performance Dashboards	Team Performance Dashboards
Assistant Configuration	Predictive Lead & Opportunity Scoring	Relationship Analytics	Who knows whom	Talking points	Notes Analysis

Sales Insights

Recommended Actions	Email Engagement	Email Auto Capture	Built In Intelligence

Embedded Intelligence

Guided Sales Process	Word and Email Templates	Power BI Standard Content Pack	Forecasting	Document Management	Operational Reporting
Lead Management	Opportunity Management	Goals and Metrics	Sales Teams & Business Units	Workflows & Business Rules	Business Process Flows
Customer Relationship Management	Sales Force Automation	Sales Pipeline Dashboards	Views & Reports	Sys Admin & Config	User Management & Security

Sales Execution	Sales Performance	Core and System Administration

Stakeholder Relationship Management and Sales Management

Included Capability	Future Capability

PROJECT
CONSTRUCT

OUR APPROACH

Consultant led

Proven implementation method

6-week engagement

Train-the-trainer

Predefined scope

Predefined templates

PROJECT TIMELINE

	1	2	3	4	5	6	7

Kick-off and Analysis

Kick-Off

Workshops & Fit Gap

Playback

Build

CONFIGURE

Test data import

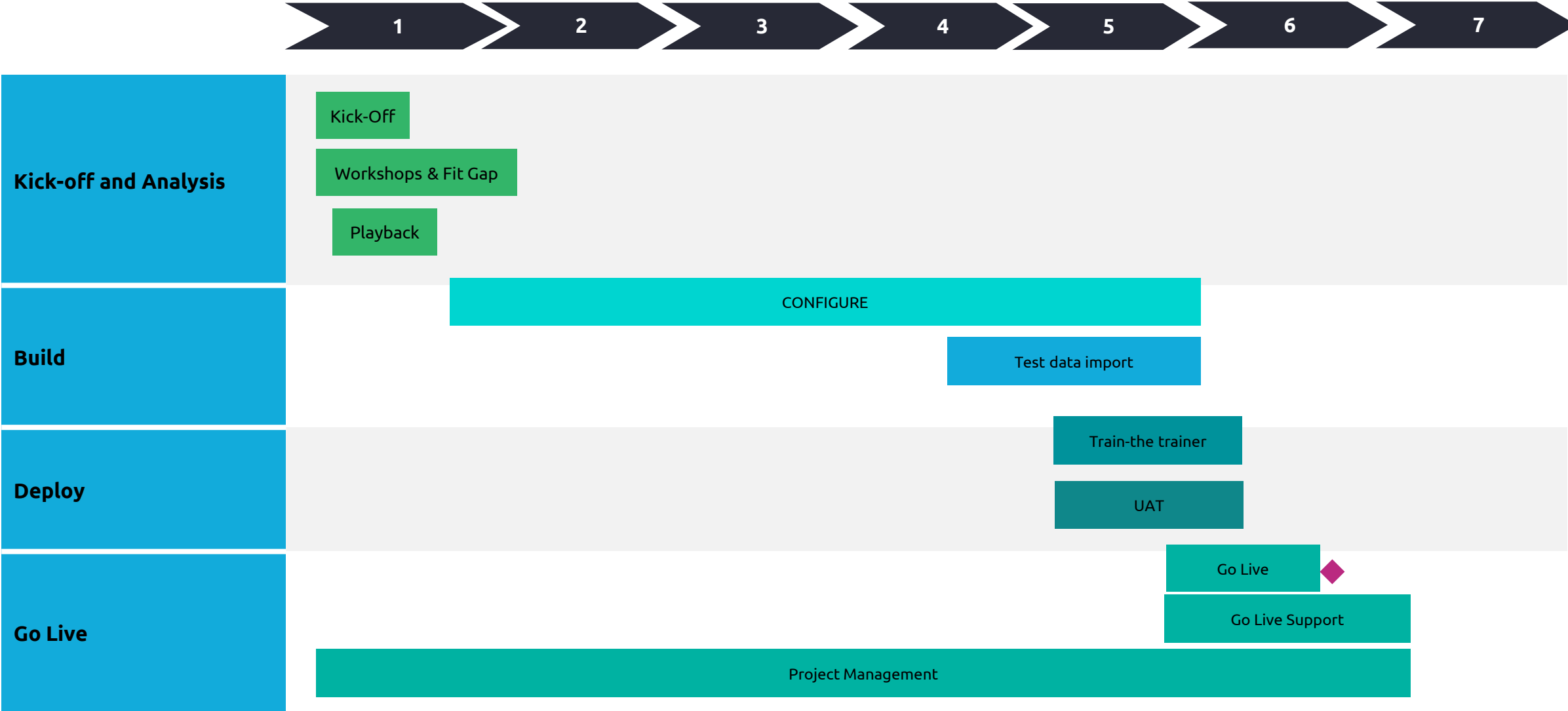**Deploy**

Train-the trainer

UAT

Go Live

Go Live

Go Live Support

Project Management
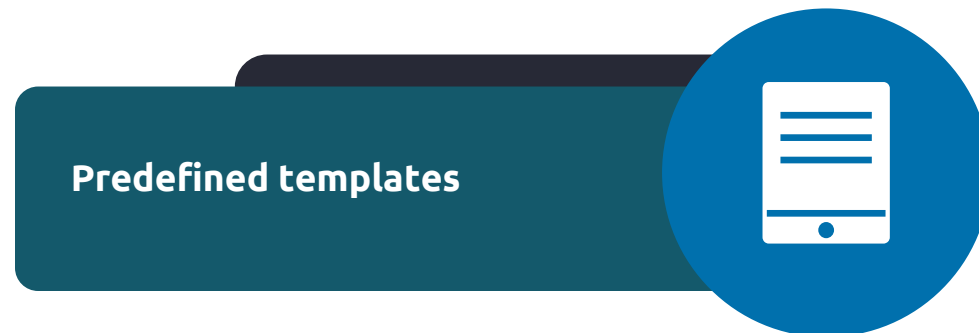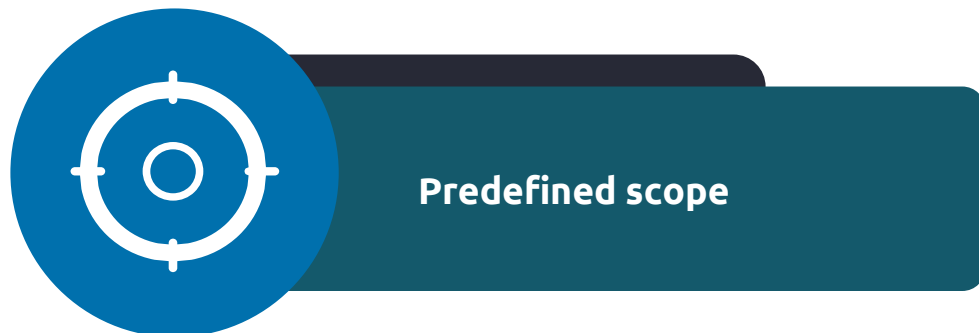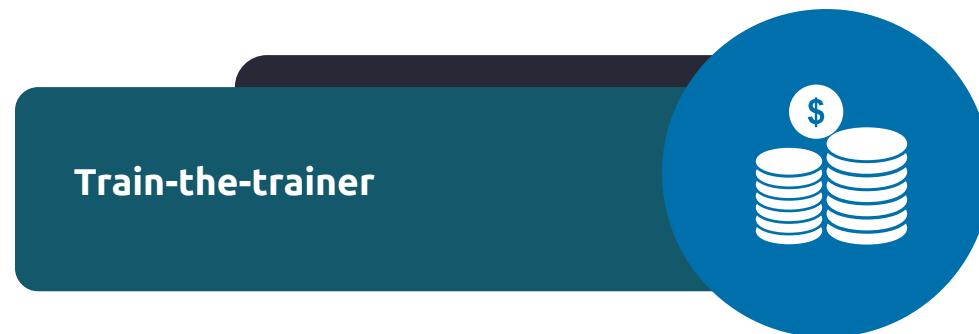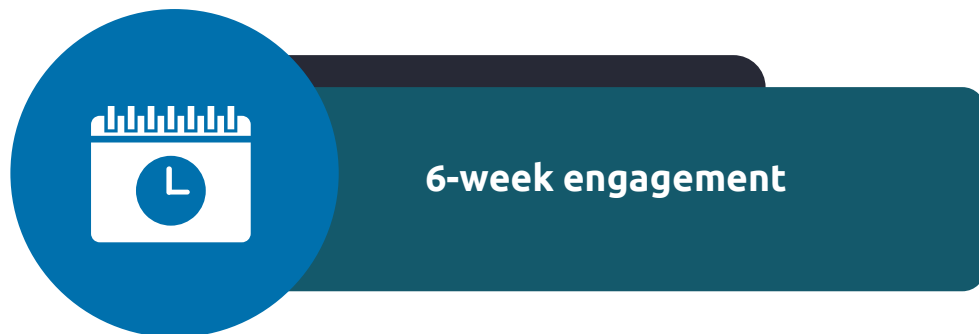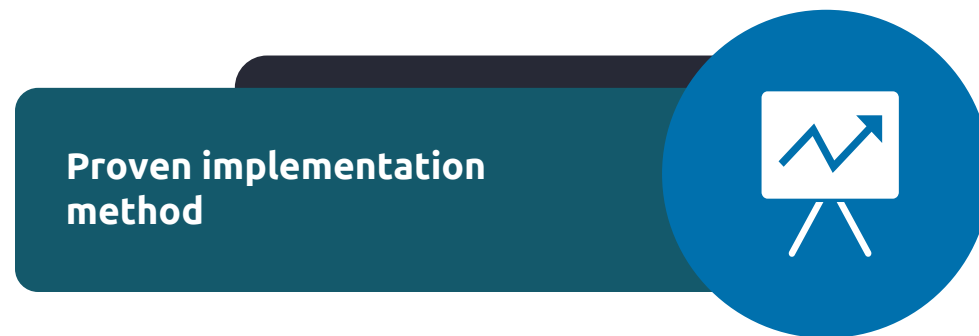
PROJECT SCOPE

Rapid Results deployment of Dynamics 365 for Sales

- High-Level Workshop to understand the base Sales requirements.

- Setup of Out of the Box (OOB) functional areas related to Leads, Opportunities, and Contacts.

- Configuration of 1 lead to opportunity business process and 1 opportunity business process flows with up to 8 stages and 6 steps.

- Implementation of up to 30 field configurations.

- Configuration of 4 automated workflows (up to 8 steps each) across the functional areas.

- Data import using Standard import templates for accounts, contacts and open leads and opportunities.

- Project management and prioritisation with your team on the configurations required to the base solution.

INCLUSIONS

Base configuration

- Auditing rules and requirements (up to 5 entities), duplicate detection rules (up to 10 simple rules)
- Theme, look and feel (OOB themes)
- Security Roles & Business Units

Sales Configurations

- Initial Sales setup
- Leads to Opportunity entities and flow of data
- Lead to Contact relationship
- Basic business process flow and workflow (up to 2)
- Dynamics 365 Sales Forms, Views & Entities
- Custom queues and quote templates (up to 2)
- Custom email, word template and notifications (up to 1 each)
- Custom charts & views (up to 4)
- Mobile Forms

Dashboard & Reporting Configuration:

- Power BI connector pack (OOB)
- D365 Sales dashboard (OOB, up to 2 simple dashboards)
- Sales Insights & Intelligence aspects included in base enterprise license

Data Migration

- Importing of Accounts and Contacts, and Open Opportunities supplied by your team in a templated format defined by us.

Train-the-trainer

- Training of key users will be done via a train the trainer style approach with standard training materials and with the objective of having super users trained up to deliver training to the rest of the business

Deployment & Go-Live

- User Acceptance Testing support (8 hours timeboxed)
- Deployment to Production
- Go-Live Support (4 hours timeboxed)
- Post implementation review and planning of future enhancements and opportunities

Assumptions

- Capgemini to be nominated as Claimed Partner of Record (CPoR) for Dynamics 365 and Power Platform.
- Capgemini to be nominated as Digital Partner of Record (DPoR) for Microsoft subscriptions.
- Project deliverable will only include a Production ready solution.
- Only 2 instances (Sandbox & Production) will be configured.

EXCLUSIONS

- Deployment (including training and configuration) of other functional areas that are not specifically mentioned in the inclusions section above e.g. Marketing, Customer Service, Field Service or other Business Application components.

- Integration to external systems (This will be viewed as a potential Future Phase).

- Installation and configuration of third party products.

- Development of reports and web resources.

- Setup of Quotes, Orders and Invoices will be limited to configurations, Customisations or custom development for complex quoting and pricing mechanism is excluded from the scope of this project.

- Setup and configuration of Product Catalogue and LinkedIn integration are excluded from the scope of this project.

- Setup and configuration of SharePoint, except for enabling the standard Out of the Box Server-Side Integration and Document Management.

- Setup and configuration of Exchange Online or Office 365, except for the enabling of Out of the Box Server-Side Integration with either Exchange On-Premise or Exchange Online.

- Customisations including custom development, custom scripts, plugin and Azure development are excluded from the scope of this project.

- The following aspects of data migration and import:

    - Data cleansing (this is the your responsibility).

    - Extracting data from existing systems (this is your responsibility).

    - Populating Templates with extracted data.

    - Any modification to the standard upload templates.

    - Resolving Data Issues found upon import.

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YOU WANT

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