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Dynamics 365 Sales

7 weeks to live Agile implementation

Contents

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Get your sales moving with Dynamics 365 Sales

Running on Microsoft's cloud, Dynamics 365 Sales will drive your business to new levels, giving sales and account management the tools they need to push the accelerator and grow your business.

You can harness the full power of the cloud, giving your teams full unfettered access to this state-of-the-art sales solution in under seven weeks.

Our implementation methodology will give you the benefits of a tried-and-tested Agile approach and the power to put together the sprints needed to get your sales engine up and running.

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The Columbus Customer Engagement

Agile methodology

Overview of Agile

Each sprint will consist of joint workshops to do the following:

- Walk you through the "out-of-the-box" system to show you how to use it

- Capture and document fits and gaps to how you would like to work

- Share this documentation with you

- You'll be given access to the out-of-the-box system for hands-on experience as part of your self learning

- We'll have an open call for one hour at the end of each day to answer questions and provide support

- Columbus will build the system to fill the gaps

- Walk you through the configured area and the sprint will be closed

- You'll be given access to the configured area for hands-on experience and self learning

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What is a sprint?

Share findings
2

Build config in dev
3

In parallel client uses test
4

Milestone

Educate and gather gaps
1

Team call at the end of each day
5

Milestone

Close sprint
8

Team huddle and playback
7

Move dev to test
6

- Sprints are typically 1 to 2 weeks duration

- They require a lot of real engagement from the client

- Hands-on sprints mean learning is much quicker

- No education or large testing required at the end

- Different milestone points and documentation
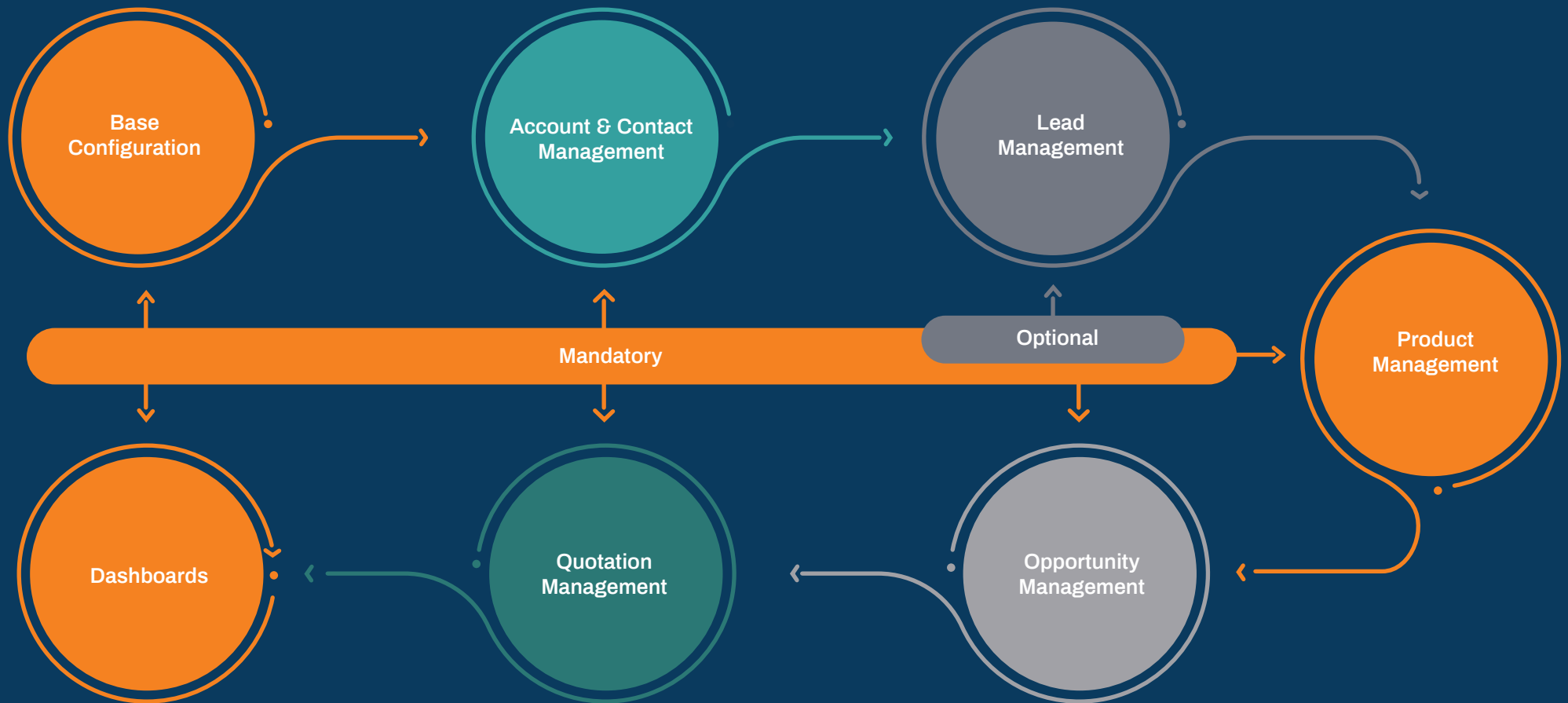
- Shared effort on System Design

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The sprints that make up a project

Sprint 1 | Sprint 2 | Sprint 3 | Sprint 4 | Sprint 5
1 | 2 | 3 | 4 | 5
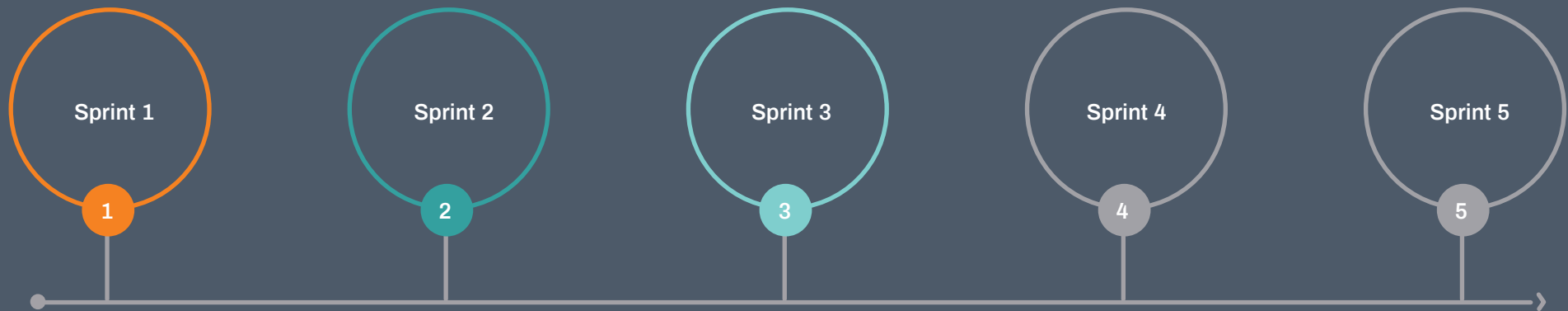
- Sprints normally run serially

- They are organised and led by the Scrum-Master

- Involves Business Decision Makers (BDM) from the client – each sprint can involve different BDMs

- Typically includes a core from client that forms the "champions" for the new solution

Introducing the Agile sprints for sales

Base Configuration

Account & Contact Management

Lead Management

Mandatory

Optional

Product Management

Dashboards

Quotation Management

Opportunity Management

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The implementation has six or seven sprints, depending on whether you handle leads or go straight to opportunities. The sprints are consecutive and each sprint is between four and seven days long.

A fantastic key benefit of doing an Agile implementation is that it's a very hands-on approach. That means your team are completely engaged on the implementation and learn the product during the build. Plus, it will lead to a solution that fits your needs like a glove.

Here are some other benefits:

- Unlike other products, Dynamics can be configured to suit you

- When you're working within the Agile framework, your users will get deeply involved from Day 1. So, this approach doesn't need time at the end for user training or complex handovers and validations

- It's seven weeks end to end so your business can be up and runnning in less than two months

What's involved during the sprints

Base Configuration

The base setup of the environment. It includes currencies, price lists, integrations to sharepoint, email and a lot of other administrative baseline details to set the system up.

Lead Management

The creation of leads, the channels they come in from and what critical information you need to capture to qualify the leads and turn them into Opportunities. This is optional because some companies do not create leads – they go directly to Opportunities.

Opportunity Management

Covers the way that you interact with your opportunities, how you review and manage the pipeline, and the way that you engage with your prospects as you drive through your opportunity pipeline.

Account and Contact Management

Covers the way that companies, customers and prospects are defined and stored. It also focuses on the individuals that work for those companies and the way that contact interactions are defined and managed.

Product Management

The product catalogue, including product families, or groups, pricing, categorisation of products, properties and price discounting rules.

Quotation Management

The generation of quotes, linking products and pricing to generate quotes and quote revision. This will also handle order management or will define how you will integrate sales through to finance for the management of orders.

Dashboards and Reporting

The standard reporting, including sales dashboards and charts. It will show you what's available, how you can make the best of the powerful reporting facilities available and how you can add to these dashboards and charts to suit your business needs.

Contact:

Do you want to know more about how we can help you?

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About Columbus

Columbus is a global IT services and consulting corporation with more than 2,000 employees serving our customers worldwide. We bring digital transformation into your business and position you to thrive far into the future.We are experts in designing, developing, implementing, upgrading and maintaining digital business applications that help your business succeed in the digital transformation. Our consultants have experience in developing businesses in many different industries all over the world.

We offer a comprehensive solution portfolio with deep industry knowledge, extensive technology expertise and profound customer insight. We have proven this through 30 years of experience serving more than 5,000 customers worldwide. Let us help you realise the full potential of your business.

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