

Concept study Dynamics 365 Sales

Boost your sales with Dynamics 365 Sales

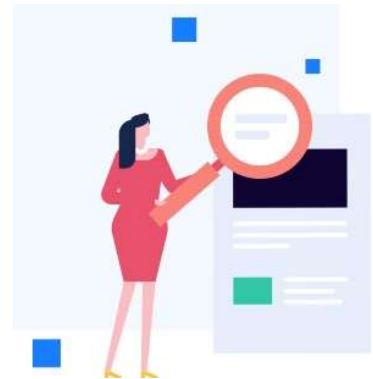
WHAT

Do you want to optimize your sales process and gain more insight into the sales efforts? During this concept study with a focus on Microsoft Dynamics 365 Sales, ConXioN has a thorough conversation with your project team, which usually consists of managers, salespeople and key employees. We start off with an inspiration session where we show the key features and possibilities of Dynamics 365 Sales

After that, our consultants determine the current situation (AS IS) for each type of employee. We investigate the existing sales process, the way of working, the currently used software tools, and so on.

The desired future situation (TO BE) is also extensively analyzed. How do end users want to look up customer data and follow up on opportunities? Which fields should be added, tailored to your way of working? Is there a need for other software integrations? These are just some of the questions we are looking to answer together. Of course, during the analysis, we also pay attention to security (role-based and user-based).

For this analysis of the AS IS and TO BE situations, we map out both the **strategic vision** as well as the **functional needs** to get a clear view of the organization and the process. In addition, we also carry out a **technical analysis**: which solution matches the overall picture and your expectations best?



Key points



Analysis of the AS IS / TO BE
situations



Mapped out sales process



Functional, technical and organizational



For every type of user

WHY

Usually, the best technical solution or a ready-made solution is not enough. As an employee and as an organization, you also need **a solution that fits like a glove**. That is why, from the onset, we focus on the end user and on **change management**: a solution the end user does not use is just a waste of your time and money.

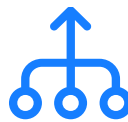


Hence **the importance** of this concept study. The thorough preliminary investigation prevents bad investments, and the end result makes it possible to make the right decision.

5 benefits



Tailor-made solution



Focus on the end user



Control over budget



Detailed assessment



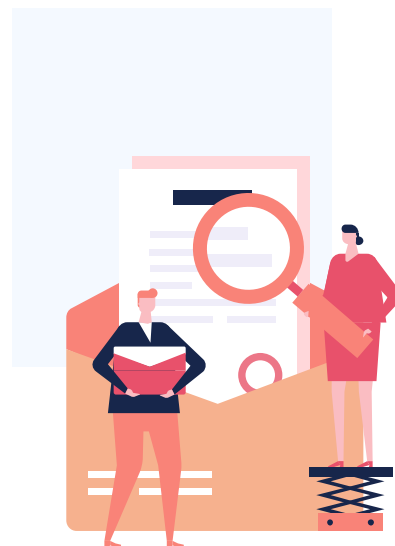
Clear roadmap



HOW

During the concept study, we will investigate how to close the gap between the AS IS and the TO BE situations. We propose a fitting functional and technical solution, including a **detailed quote** and **roadmap**.

We take the end users and their possible resistance to the proposed changes into account. That is why this concept study also includes an **adoption workshop** in which we discuss how the communication, documentation, training and support of the end users is best done in your organization. This adoption plan is also included in our proposal.



Deliverables



Analysis of the AS IS/TO BE situations



Adoption workshop



Quote with a description of the concrete solution, including pricing and timing based on the concept study



Inspire session Dynamics 365 Sales



Adoption plan

Contact us

for more information.



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