



100 DAY PROGRAM

# PROJECT PROPOSAL

100-Day Dynamics 365 Sales &  
Customer Insights – Journeys program



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## → EXECUTIVE SUMMARY

Experience Digital's 100-Day CRM Accelerator is a structured, entry-level implementation of Microsoft Dynamics 365 Sales and Customer Insights – Journeys (CIJ). This program is purpose-built for organisations seeking a fast, effective way to begin leveraging Microsoft's CRM and marketing automation platforms.

Over the course of 100 business days, we deliver a production-ready Dynamics 365 Sales and CIJ environment, customised for your business use cases, with guided support from our expert team throughout planning, configuration, and launch.

Our engagement is structured into clear, outcome-based phases:

- Discovery & Planning: We work with your teams to understand business goals, define user roles, and identify key sales and marketing processes.
- Sales Configuration: We establish a foundational CRM setup tailored to how your team engages leads, opportunities, contacts, and accounts.
- CI Journeys Configuration: We enable customer segmentation, marketing journeys, and consent governance to support compliant and engaging communication.
- Handover & Hypercare: We launch your solution with training, adoption guidance, and hypercare support to ensure a confident transition.
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This program is designed for organisations with straightforward requirements looking for a fast and sustainable starting point in Dynamics 365. It establishes a scalable foundation that can grow with your business and integrate seamlessly with other Microsoft tools.

Kind regards,



David Theodorou  
Project Manager  
Experience Digital

# GET TO KNOW US



Experience Digital is an award-winning technology services and consultancy firm with over a decade of expertise in modernizing businesses, integrating critical systems, and enabling emerging technologies.

With a team of over 60 professionals across the Asia-Pacific region and a proven track record of successful projects across mid market and enterprises, we offer our clients unique global industry expertise. Our approach combines the comprehensive insights and capabilities typically associated with tier-one providers while delivering personalized attention to every partnership.

**15+**

Years of operations

**3**

Offices worldwide

**200+**

Happy clients

**60+**

Employees

**Founder Led**

**AWS Rising Star Partner of the Year**

AWS Partner Network (APN) Awards 2022



**Microsoft**  
Solutions Partner  
Business Applications



# OUR SERVICES

- Enterprise applications - Dynamics 365, including Sales, Business Central and Finance and Operations, CMS, CRMs, Process Automation and Customer Self-Service platforms.
- Systems Integration - linking various software, IT systems and data, to work functionally together.
- Modernisation of Legacy Applications - Digital Transformation, Upgrades, Legacy Data Migrations.
- Business Process Automation - workflow engines, finance processes, stock control.
- Data Analytics Consulting - Data Strategy and Architecture, Data Analytics, Data Lakes, Migrations and Sensitisation.

# OUR 5 PROMISES

1. We'll look for the most cost-effective solution to solve your problem, but never at the compromise of quality or security.
2. We'll be responsive, transparent and work hard with incredibly thoughtful governance of every project or assignment we work on.
3. We'll continually invest in ourselves and our competencies – to give you more value and ensure you are leveraging the best technologies that suit your desired business outcome.
4. We'll treat your business as our own, with a deep fundamental empathy for your operations and outcomes that aim to deliver a service level outside what is normally expected.
5. We understand stable project management is important to any project delivery. Should we ever have the need to bring on someone else to continue a project, we'll cover the costs of onboarding that person.

# ACCREDITATIONS



As a Microsoft Business Applications Launch Partner, we are uniquely positioned to deliver innovative solutions within the Microsoft ecosystem. This partnership highlights our deep expertise in Microsoft Dynamics 365 and ensures that our clients benefit from the latest technologies and best practices. Being a Launch Partner allows us to provide cutting-edge insights and support, helping organisations like yours achieve their objectives with the most advanced tools available.



When we launched our Microsoft practice, we immediately earned Gold Microsoft Partner status, a testament to our commitment to excellence and our expertise in delivering Microsoft solutions. We have consistently maintained this status by meeting Microsoft's rigorous standards for technical capability, customer satisfaction, and innovation. Even as the Microsoft Partner program evolved and the Gold status was retired earlier this year, we have continued to uphold the high standards that earned us this recognition, ensuring that our clients receive top-tier support and solutions in their Microsoft implementations.



We are proud to be recognized as an Advanced Supplier by the NSW Government, a distinction that places us on a prized vendor service list, qualified to provide service contracts across various government departments. This status signifies that we have undergone a rigorous vetting process, demonstrating our ability to meet the high standards required by the NSW Government. Being an Advanced Supplier not only validates our commitment to quality and reliability but also positions us as a trusted partner capable of delivering complex solutions to public sector clients.



We are proud to be recognized as an Advanced Tier AWS Services Partner, an accolade we achieved in record time due to our deep commitment to delivering innovative cloud solutions. Our rapid ascent to this status reflects our expertise and dedication to the AWS ecosystem. In recognition of our accomplishments, we were awarded the AWS Rising Star Partner of the Year award in 2022. This prestigious award highlights our exceptional growth and impact within the AWS community, marking us as a leader in cloud services and a trusted partner for businesses looking to leverage the full potential of AWS.



We are proud to have two Microsoft MVPs (Most Valuable Professionals) in our core leadership team, highlighting our deep connection with Microsoft and our commitment to excellence in the Microsoft ecosystem. This accolade is awarded to experts who demonstrate exceptional technical expertise and community leadership, reinforcing our position as a trusted partner in the Microsoft landscape. Our MVPs have direct access to Microsoft's product teams, allowing us to gain insights and provide feedback that directly influences the platform's development. This close relationship ensures that we can quickly resolve issues and leverage Microsoft's resources to deliver outstanding results for our clients.

# WE TAKE SECURITY SERIOUSLY

Experience Digital takes our security, and by extension, your security extremely seriously. We utilise industry leading systems and practices (Such as LastPass and Microsoft Teams) with enterprise level threat detection policies and audit procedures. In our workings with the cloud, we comply and are an authorised, certified assessor for what is defined as best practice in the industry for cloud based architecture.

Protocol Checklist	Status
Industry Certification: The vendor aligns with industry recognised certification of Information Security such as ISO27001 or have a formalised cyber security framework to adhere to security industry best practices such as NIST (National Institute of Standards & Technology) framework.	Compliant through the Australian Signals Directorate (ASD) 5 Pillars assessment.
MFA Enabled: The vendor has a multi-factor authentication solution in place to authenticate users accessing their systems remotely.	We use MFA systems when interacting with any client facing systems
Application Verification Standards: The vendor adheres to OWASP Application Security Verification Standards (ASVS) during the development of web applications or interfaces	The applications we build or support comply to OWASP Application Verification Standards.

# PROGRAM SUMMARY



## Offering Overview

The 100-Day CRM Accelerator is designed to provide a structured, low-risk pathway for organisations looking to establish Microsoft Dynamics 365 Sales and Customer Insights – Journeys (CIJ) as their core sales and marketing platform.

This engagement delivers a production-ready system tailored to your business's needs—with scoped time allocated to understanding your workflows, configuring key elements, and supporting user enablement from day one.

## Key Objectives:

- Establish a secure, user-ready instance of Dynamics 365 Sales and CIJ
- Configure foundational elements based on real-world sales and marketing processes
- Enable your team to actively manage leads, opportunities, campaigns, and journeys
- Lay the groundwork for future expansion, integration, or customisation

This is not a large-scale transformation program—it is a focused, high-value starting point. By limiting scope to core CRM and CIJ functionality, we accelerate time to value while ensuring foundational elements are implemented with care.

Experience Digital applies a phased, milestone-driven approach aligned to Microsoft's Success by Design methodology, ensuring transparency, governance, and business alignment throughout the project lifecycle.

# IMPLEMENTATION APPROACH

The 100-Day CRM Accelerator is delivered using a phased approach that ensures clarity, stakeholder involvement, and minimal disruption. Each phase is outcome-based, with checkpoints to validate alignment and readiness before moving forward.

Experience Digital applies Microsoft's Success by Design framework, paired with our proven hybrid-agile delivery model. This ensures a balance of structure and flexibility—so we can adapt to your business realities while delivering a clear and consistent pathway to go-live.

## Delivery Phases:

1. Discovery & Planning (20 Days)
2. Structured workshops with your sales, marketing, and operations teams to identify user roles, data structures, and process needs. Outputs include a high-level solution design, data mapping, and configuration scope.
3. Sales Configuration (30 Days)
4. Setup of Dynamics 365 Sales with base entities (leads, opportunities, contacts, accounts), tailored views and forms, and initial business process flows to support your sales lifecycle.
5. Customer Insights – Journeys Configuration (30 Days)
6. Enablement of CI Journeys, including consent model setup, email marketing and segmentation, and basic customer journeys (e.g., onboarding or campaign workflows), aligned with your core use cases.
7. Handover, Enablement & Hypercare (20 Days)
8. We provide guided walkthroughs, admin and user documentation, go-live support, and two weeks of hypercare to assist your teams in navigating the new system with confidence.

Each phase builds upon the last—so your teams gain early insight, practical training, and increasing system ownership as the solution evolves.



# PROJECT MANAGEMENT ETHOS

At Experience Digital, our project management ethos is rooted in a structured and methodical approach tailored to the specific needs and complexities of each client. For this program, we apply a disciplined, milestone-driven methodology that ensures oversight, clear communication, and proactive risk management throughout the project's lifecycle.

## **Comprehensive Planning and Milestone-Driven Execution**

Our approach begins with thorough planning that covers all aspects of the project, from defining the scope to allocating resources. By working closely with you, we establish clear objectives, deliverables, and timelines. This detailed planning is coupled with a milestone-driven methodology, ensuring regular checkpoints throughout the project. Each milestone marks a key achievement, keeping the project on track and allowing us to promptly address any issues.

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## **Clear Communication Channels**

We establish structured and consistent communication channels to ensure that all project stakeholders are well-informed throughout the project lifecycle. By setting up regular and ad-hoc communication routines, we keep everyone aligned on the project's progress, changes, and potential risks. This communication strategy includes scheduled status updates, escalation paths for issues, and open forums for feedback, ensuring transparency and collaboration at every stage of the project.

## → 100-DAY DYNAMICS 365 SALES & CIJ PROGRAM

### **Strong Governance and Accountability**

We prioritise strong governance structures to guide and oversee project execution. Our governance model includes a steering committee with key stakeholders from both Experience Digital and yourselves. This committee provides strategic direction, resolves high-level issues, and ensures the project aligns with your broader organisational goals, promoting accountability at every level.

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### **Proactive Risk Management**

We integrate risk management into our project approach by identifying and addressing potential challenges early on through continuous monitoring and assessments. This enables us to develop targeted mitigation strategies, keeping the project on track. We maintain risk registers and implement response plans, regularly reviewing and updating them throughout the project lifecycle.

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### **Commitment to Continuous Improvement**

We focus on continuous improvement throughout the project. Feedback is gathered at every stage to refine our processes and improve the quality of deliverables. This iterative approach allows us to adapt to changing requirements, ensuring the solution we deliver meets your evolving needs effectively.

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### **End-to-End Support and Beyond**

Our commitment to you extends beyond implementation. We provide ongoing support to ensure the system continues to meet your needs as their operations evolve. This includes regular system reviews, updates, and enhancements, keeping the system in line with best practices and emerging technologies.

# PROJECT ROADMAP



# WHAT'S INCLUDED

## Implementation Approach

The 100-Day CRM Accelerator includes a clear and structured breakdown of work across four key stages. Each phase is aligned to real-world use cases, ensuring you're not only getting a working system, but one that's configured to reflect how your teams operate day-to-day.

### 1. Discovery & Planning (20 Business Days)

Structured engagement with key stakeholders to validate business needs and confirm system requirements. This phase is essential to ensure technical design is grounded in practical context. Activities:

- Stakeholder workshops across Sales and Marketing
- Use case identification for CRM and CIJ
- Review of data sources, role hierarchies, permissions
- Documentation of functional requirements
- Solution design and implementation planning

### 2. Platform Configuration – Dynamics 365 Sales (30 Business Days)

A baseline implementation of Sales Hub that supports your lead-to-opportunity flow and account management needs.

#### Deliverables:

- Configuration of Leads, Opportunities, Contacts, Accounts
- Role-based security model setup
- Customised views and forms based on prioritised fields
- Simple workflows or business process flows to guide sales activity
- Initial dashboards and reporting views

### 3. Platform Configuration – Customer Insights – Journeys (30 Business Days)

Setup and enablement of core CIJ features to support marketing automation and customer journey orchestration.

#### Deliverables:

- Consent model guidance and configuration
- Email marketing setup with branded templates
- Segmentation and audience list configuration
- Creation of up to 3 journeys (e.g., onboarding, nurture, event promotion)
- Integration with Dynamics 365 Sales for contact syncing and triggers

## → 100-DAY DYNAMICS 365 SALES & CIJ PROGRAM

### Implementation Approach

#### 4. Handover, Enablement & Hypercare (20 Business Days)

Transition the solution to your internal team, support adoption, and stabilise the platform post-launch.

##### **Deliverables:**

- Handover workshop and walkthrough of configured system
- Admin and end-user guidance
- Go-live support and triage during first 2 weeks of use
- Recommendations for future optimisation and next-phase enhancements



# NEXT STEPS

The 100-Day CRM Accelerator is ready to be initiated as soon as your team is. We recommend the following next steps to formalise engagement and align our teams for a successful delivery.

1. Proposal Acceptance
2. Review and confirm approval of this engagement approach and delivery scope.
3. Commercial Agreement
4. We'll provide a Statement of Work (SoW) aligned to this proposal, outlining timelines, deliverables, pricing, and resource commitments.
5. Kick-off Preparation
6. Nominate internal stakeholders for workshops and identify any in-flight initiatives that may affect the timeline.
7. Project Launch
8. A formal kick-off will establish delivery cadence, expectations, and tooling setup, ensuring both teams are aligned from day one.

## Estimated Timeline

Project commencement is typically possible within 2–3 weeks of agreement, depending on team availability and scheduling alignment.

# OUR WORK SPEAKS FOR ITSELF



## Scottish Pacific

Experience Digital has been supporting Scottish Pacific Business Finance from all aspects of their business, from custom integration to ERP management



## Springfield City Group

SCG has been a valued client of ours since 2017. Over the years, we've provided comprehensive support in business solutions and process improvements, significantly enhancing their operational efficiency, including the successful implementation of D365 F&O, along with other tailored systems.



## AWH

Experience Digital, in collaboration with Fujitsu, supported AWH in the rebuilding of their custom ERP system. This system manages the deployment of 80% of the world's wool and 60% of the world's cotton



## Harris Farm Markets

Experience Digital assisted Harris Farm Markets with their Dynamics Finance automated and integrated testing suite, ensuring that their multiple points of interconnect remained stable throughout any upgrade process

# WHAT OUR CLIENTS SAY



We needed a service provider to gain a deep understanding of the challenges we were facing, and to assist us to build a new service that would overcome those challenges, and then provide a platform upon which we could execute some of the key strategic objectives we had for the near and mid-term future. Crucially all of this needed to happen without any business interruption. The team achieved that with aplomb, and we are incredibly appreciative of the role their AWS skills and expertise played in the success of the project.

**Christian Dowling**

NSW Government Spatial Services Senior Project Manager



These changes have given key stakeholders across sales, marketing and operations, the ability to seamlessly access real-time information regarding leads. Enquiry origination has enabled ScotPac to rely less on hearsay and use data to make more informed, faster marketing decisions.

**Emer Byrne**

Scottish Pacific Head of Direct Leads Generation



Despite facing tight deadlines and resource constraints, the Experience Digital team demonstrated exceptional professionalism, proactive communication, and unwavering dedication towards the completion of tasks set by us. Their proactive approach ensured effective collaboration and swift resolution of any issues that arose. Additionally, their expertise in documentation was invaluable in keeping the project on track. We truly appreciate their efforts, especially in implementing testing automation, and look forward to potential future collaborations.

**Swechchha Boki Shrestha**

Harris Farm Markets IT PMO Manager

