

Overview

This one-day expert-led assessment is designed to help organizations evaluate the fit, readiness and business value of Microsoft Dynamics 365 Sales. Through structured discovery, live demonstrations and solution mapping. We identify current sales challenges, assess process maturity and outline how Dynamics 365 Sales can streamline operations, improve visibility, and accelerate revenue growth.

The engagement is ideal for SMB and mid-market organizations exploring Dynamics 365 Sales or planning to optimize an existing CRM environment.

Objectives

- Understand current sales processes, tools, and pain points
- Evaluate alignment with Dynamics 365 Sales capabilities
- Demonstrate key features in the context of your business
- Identify gaps, risks, and improvement opportunities
- Provide a high-level roadmap and investment estimate

Assessment Agenda (1 Day | 5–6 Hours)

1. Business Discovery & Current State Review
2. Solution Alignment & Use Case Mapping
3. Tailored Dynamics 365 Sales Demonstration
4. Art of the Possible
5. Roadmap & Recommendations

Key Deliverables

- Dynamics 365 Sales Fit Assessment
- High-Level Solution & Architecture Overview
- Licensing & Cost Estimate (Subscriptions + Services)
- Executive Summary & Next Steps Presentation

Engagement Model

- Duration: 1 Business Day (5–6 hours)
- Delivery: Remote or Onsite
- Participants:
 - Sales Leadership
 - Key Sales Users
 - IT / CRM Administrator
 - Business Stakeholders

Value to the Customer

- Clear understanding of how Dynamics 365 Sales supports business goals
- Reduced risk before CRM investment
- Accelerated decision-making
- Actionable roadmap for deployment or optimization
- Alignment with Microsoft best practices and AI-powered selling

Commercials

- Free / Subsidized (Subject to Microsoft funding and eligibility)
- Fixed-Price Professional Services Offering