



WE HELP
**SOLVE
YOUR
BUSINESS
PROBLEMS**
USING MICROSOFT DYNAMICS



**WE MAKE DOING
BUSINESS EASY!**



TruNorthDynamics.com



CLIENT PROJECT FLOW



01

Client Discovery

- Understanding client need and confirm if D365 is a fit



02

Demo

- System overview by the Solution Architect (SA)
- Includes pre-demo questionnaire (if applicable)



03

Blueprint

- Client wants to move forward
- Quote provided
- Opportunity won/invoice generated
- Project created
- ISV demos scheduled



04

Solution Overview

- Solution Overview document delivered
- Document reviewed
- Client agrees to final Solution Overview



05

Statement of Work

- Create project opportunity with 3rd party products
- Statement of Work/Quote sent to the client
- Statement of Work approved



06

Project

- Project kick-off meeting scheduled by PM
- Implementation PM and Project Team
- Go live



07

Project Handoff

- Hand off to Client Success Team/Support Team