

What we cover

Meet and plan with our senior-level team who has successfully run implementations across the entire Dynamics stack

Get real world "boots-on-the-ground" feedback on project scoping and sequencing

A technical approach that plans for integration with your current environment

Shared best practices and assist with driving the due diligence process to identify land mines and pitfalls to avoid

Maximize Sales and Marketing team's user adoption

This One Day Workshop is designed to provide a plan to successfully implement Dynamics CRM.

Introduction

- ✓ Current Situation
- ✓ Proposed Solution
- ✓ Risks / Management Commitment
- ✓ Timeline and Estimated Costs

Assessment

- ✓ Business Needs
- ✓ Current Technologies

Functional Requirements

- ✓ Process Inventory
- ✓ Business Entity Model

Implementation Plan

- ✓ Implementation Approach
- ✓ Technical Architecture Approach

Next Steps

