

Accelerate CRM Adoption with a Streamlined Dynamics 365 Sales Implementation

Western Computer's base implementation of Dynamics 365 Sales is designed to help your team hit the ground running with a live, fully functional CRM tailored to your business needs. This offering is ideal for small to mid-sized businesses—or departmental rollouts within larger enterprises—looking to centralize sales activities, enable guided processes, and boost team productivity without unnecessary customization.

By configuring core sales components and leveraging native Microsoft 365 integration—including Copilot for real-time assistance and AI-powered insights—this rapid implementation helps you build a foundation for smarter selling and scalable growth.

Core Capabilities Delivered:

- **Configuration of Sales Entities:** Setup of Leads, Opportunities, Contacts, Accounts, and Activities aligned with proven sales methodologies.
- **Business Process Flows:** Out-of-the-box workflows to guide sellers from lead qualification to deal closure—ensuring consistency and data integrity.
- **Security Role Setup:** Role-based permissions ensure users access only the data relevant to their role, improving compliance and governance.
- **Outlook Integration:** Enable seamless tracking of emails, tasks, and calendar events directly within Dynamics 365 Sales.
- **Copilot Activation:** Empower your team with AI-generated summaries, next-step suggestions, and natural language data queries to increase productivity and forecast accuracy.

Offer Scope Includes:

- Initial discovery session to align on goals and business priorities
- Configuration of core CRM components and guided sales stages
- Light data migration (e.g., contacts, accounts)
- Outlook email and activity tracking enablement
- End-user training and documentation
- Delivery of a live Dynamics 365 Sales environment ready for immediate use

Offer Scope Includes:

- Centralized visibility into pipeline, communications, and seller activity
- Accelerated time-to-value with a live CRM deployed in days—not months
- Improved adoption through simplified interfaces and AI-assisted workflows
- Structured, repeatable sales processes that reduce cycle times
- A scalable foundation for future automation, analytics, and custom apps


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Western Computer has been ranked as a **Leader** and **#1 in user satisfaction** in the Microsoft Consulting Services category by G2, the world's largest and most trusted software marketplace, for our commitment to delivering exceptional Microsoft-specific consulting services and vast experience in implementing comprehensive Microsoft applications.

Why Western Computer :

As a Microsoft Solutions Partner with 30+ years of CRM and ERP experience, Western Computer has helped hundreds of businesses improve customer engagement through digital transformation. Our proven methodology delivers a clear path forward—designed around your needs and built on the power of Microsoft's cloud-first platform.