Tigunia, LLC.
Service Description - Dynamics Sales Express Implementation

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Dynamics Sales Express Implementation

The Dynamics Sales Express implementation service provides sellers with the vital tools they require to close more deals by implementing the core functionality of Dynamics 365 sales online.
If you're looking for a competitive advantage by gaining an edge on improved insight, increased productivity, and operational efficiency through innovative technology, you found it. No matter the size of your business, we help you optimize business processes, maintain your Dynamics 365 environment, and contribute to the success of your business. Our Dynamics Consultants are part of your team for the long term.

Summary

The Dynamics Sales Express implementation service is particularly beneficial for small businesses, as they can get up and running with Dynamics 365 quickly. The service includes the following activities:

1. Analysis and Evaluation Discovery: Live sessions with your team to validate the fitment of the Dynamics Sales online standard functionality to your business.
2. Solution configuration: Configure dashboards, forms, views, tables, security, and other components of the solution.
3. Data import: Import data from Excel into Dynamics Sales Online including Accounts, Contacts, Leads, and Opportunities.
4. Training: Live session to train functional and administrative users in the use of the system
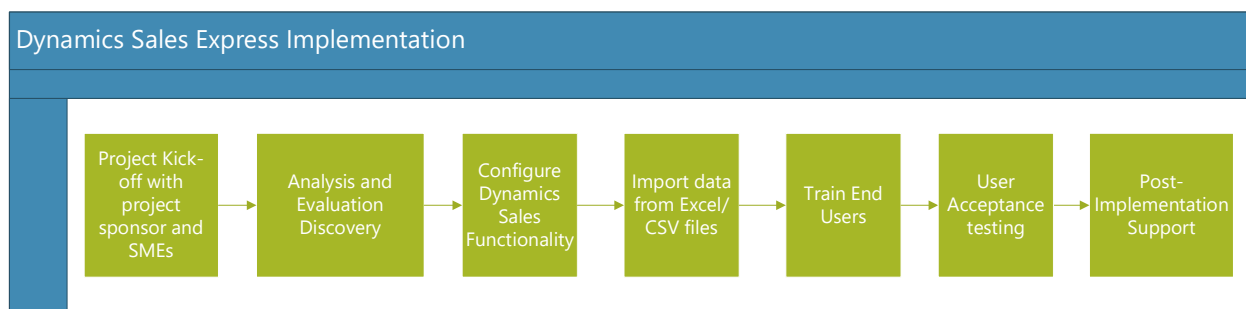5. On-demand support: Post-implementation on-demand support is available.

Why a small business should Implement Dynamics 365 for sales online.

1. Increased Efficiency: Dynamics 365 for Sales helps small businesses streamline their sales processes by providing automated workflows and data-driven insights. This makes it easier for sales teams to quickly access the customer information they need, prioritize leads, and close deals faster.
2. Improved Customer Insights: Dynamics 365 for Sales provides a 360-degree view of customers and their buying patterns, making it easier to identify trends and gain valuable insights into how to better serve them.
3. Easier Lead Management: Dynamics 365 for Sales offers a comprehensive lead management system that helps sales teams quickly track leads and capture important information about them. This helps sales teams prioritize and follow up on leads more effectively.
4. Enhanced Collaboration: Dynamics 365 for Sales makes it easy for sales teams to collaborate and share information across the organization, which can help improve the customer experience.
5. Better Reporting and Analysis: Dynamics 365 for Sales provides powerful reporting and analytics capabilities that make it easier for small business owners to track and measure key performance indicators, understand customer behavior, and make data-driven decisions.

Why a small business should start with a Dynamics Sales Express Implementation.

1. Cost Savings: Implementing Dynamics Sales with the standard functionality can save businesses money in the short and long term, as customizations tend to be costly. Additionally, customizations to the system may require additional investments over time to support and maintain.
2. Quick Implementation: Standard Dynamics Sales implementations can be completed quickly and easily. Customizations tend to add complexity and require additional time and resources to implement.
3. Ease of Use: Standard Dynamics Sales implementations are easy to use and require minimal training. Customizations can be more complex and require more time to learn and understand.
4. Scalability: Standard Dynamics Sales implementations are easily scaled to meet a business's needs. Customizations can limit scalability, as they often require more resources and investment to scale.

Engagement – Step by Step

Dynamics Sales Express Implementation

Project Kick-off with project sponsor and SMEs → Analysis and Evaluation Discovery → Configure Dynamics Sales Functionality → Import data from Excel/ CSV files → Train End Users → User Acceptance testing → Post-Implementation Support

1. Project Kick-off meeting: This meeting serves to bring the project team together and ensure everyone is on the same page. Activities included in a kick-off meeting include:
   a. Introductions: Introducing the project team and setting expectations.
   b. Review of project goals: Review the goals and objectives of the project, as well as the desired outcomes.
   c. Review of project timeline: Review the timeline for the project, including milestones and deadlines.
   d. Overview of roles and responsibilities: Discussing who is responsible for what and assigning tasks and responsibilities.
   e. Q&A session: Allowing the project team to ask questions and discuss any issues or concerns.

2. Analysis and evaluation discovery: During these sessions, we examine and evaluate the process to be implemented in Dynamics and validate the fitment with the standard sales functionality. Activities included are:
   a. Review the current sales process: Identify all the steps in the sale process and identify areas of improvement.
   b. Gather business data: Review the data that need to be imported into Dynamics and provide the necessary templates.
   c. Identify Risks: Identify potential risks and issues related to the sales process.
   d. Create an action plan: Identify the actions necessary to complete the solution implementation.

3. Solution Configuration: This is the process of configuring Dynamics 365 Sales standard functionality to be used by your organization. The specific areas of configuration are:
    a. Accounts: Form, Views, and Fields
    b. Contacts: Form, Views, and Fields
    c. Activities: Views
    d. Leads: Form, Views, Fields, qualification rules, Business Process Flow
    e. Opportunities: Form, Views, Fields, Business Process Flow, Pipeline dashboard, Sales accelerator, sales dashboard
    f. Quotes: Form, Views, Fields, Quote templates.
    g. Security roles: Validate Create, Read, Edit, Delete, Share, Append, and append to permissions.

4. Data Import: Import data for selected records
    a. Accounts
    b. Contacts
    c. Leads
    d. Opportunities
    e. Products

5. Training: Live training sessions for end users
    a. Sales Users training
    b. Admin/Power users training

6. UAT: User Acceptance testing: This is the process of testing the Dynamics configuration to ensure it meets the requirements and expectations. This is done by the users themselves. During UAT testers will use the application and provide feedback on any issue or area of improvement.

7. Post-Implementation Support: This is the process of assisting users and administrators after Dynamics has been Implemented, this includes troubleshooting, answering inquiries, and providing additional training or resources.

Out-Scope

1. Customization to Dynamics 365
2. Integration with other applications
3. Dynamics functionality not mentioned in this document.