

Dynamics 365 Sales: 8 wk Implementation

- **Initial training**

- A general overview of the product and what is available as standard, what is easy and what is difficult to do

- **Workshops for requirements gathering**

- **WS 1:** The organization's strategic goals for customers, markets, offerings. KPIs to be managed.
- **WS 2:** Customer detailing - categorization of organizations and individuals, and their relationships.
- **WS 3:** Detailing the sales process - what channels exist to generate business, what roles exist, how to collaborate, etc.
- **WS 4:** Continuation of the sales process, depending on how many open questions remain.
- **WS 5:** KPIs and follow-up.

- **Implementation of captured requirements and setup of environments and ALM management.**



1. Initial training

For the project team, about half a day.



2. Workshop package - for 5 workshops

For each business unit sales/contact center, two consultants from CRMK.



3. Configuration and customization

For CRMK to customize and parameterize the system based on your processes and needs. Price will vary depending on your needs. The typical level of effort for this step is around 100-130 hours of work.