Microsoft Partner

Dynamics 365 Custom Implementation
for sales, customer support, or marketing

4-6-weeks at USD 22,000

Our **Dynamics 365 Custom Implementation** offers a personalized solution that includes data migration, contact and opportunity configuration, custom Power BI reporting, and functional and technical training for all your employees—experience faster success with a tailored Dynamics 365 solution that fits your unique needs.

Agenda

- Gain insight into the current technology usage by the executive and leadership team.
- Identify inefficiencies and potential technology risks.
- Identify modules needed for a new solution.
- New custom solution review and approval.
- Assess how reporting can be tailored to meet your business needs.
- Licensing and costs associated with upgrading to Dynamics 365.

Our Approach

CONNECT
with your organization's team members to gain insights into their business objectives, areas for improvement, and end goals to determine the appropriate strategy.

ANALYZE
your current IT landscape and solution to identify the most effective approach. We evaluate compatibility, data integrity, and system performance.

IMPLEMENTATION PLAN
that outlines the strategy, and timeline for executing proposed solution.
We include detailed insights into licensing and costs associated.

Deliverables

- A custom implementation to meet your specific process needs.
- The functional scope of implementation.
- A delivery plan including resources and costs.
- Set up Dynamics 365: Customer Support, Sales, or Marketing.
- Setup of up to 50 users (in up to 3 different roles).
- Initial data load for contacts/accounts from Excel/CSV file format.
- Configure up to 2 Out of Box (OOTB) business workflows.
- Configure up to 20 OOTB business rules.
- Configure up to 5 Power BI custom reports and up to 2 custom dashboards.
- Basic contact/opportunity form configuration of standard fields.
- Up to 50 custom fields or form customizations.
- Functional training: 2 sessions of 1 hr. each.
- Technical training: 1 session of 1.5 hr.
- Supplemental 3rd part components and integration options.
- Data migration requirements.
- Post Go-Live Strategy.
- Power BI and Reporting
- You will be up and running in 4-6 weeks

DEFINITY FIRST

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MAKING **IT** HAPPEN

Empowering businesses to revolutionize operations through innovation.

About Definity First

As a Microsoft partner, we are proud to be one of the fastest-growing IT consulting firms in North America and we are committed to delivering the best possible experience to our customers with the expertise of our Microsoft-certified professionals.

Our talented team fosters a culture of learning and growth, making us a recognized Great Place to Work®.

We don't just build technology. We build customers for life.

| Cost-Effective Services & Faster time to market | +19 years of industry experience | +200 bilingual engineers | Results Oriented Philosophy |

Awards and Recognitions

We believe that these recognitions highlight our strengths and capabilities as a company and serve as a motivation for us to continue delivering outstanding performance and value to our clients.

- 7 Gold Microsoft competencies.
- 8 Silver Microsoft competencies.
- 2023 Forbes® Technology Council
- 2022 Gartner®Market Guide for Microsoft Product Support Services, Worldwide
- 2017, 2018, 2023 Great Place to Work®
- 2015 MS Dynamics Transformational Partner of the Year.
- 2013 MS Partner of the Year Collaboration Portals LATAM & Caribbean.
- 2009 MS Innovative on the Web Awards.

Our Clients

LA Phil | Caltech | HAMILTON | KOCH | Berkeley UNIVERSITY OF CALIFORNIA | HARVARD UNIVERSITY | ON24

FLOWSERVE | CenterPoint Energy | THE HOME DEPOT | TESLA | ON LOCATION | BD | KIRBY

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*Definity First uses Microsoft Advanced Support for Partners.