



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

During our Dynamics 365 Custom Implementation, we will cover the following:

- Gain insight into the current technology usage by the executive and leadership team.
- Connect with team members within the organization to identify business objectives, areas for improvement, desired changes, and ultimate business goals.
- 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.

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.

Why Definity First?

As a leading Microsoft Partner, we have extensive expertise in leveraging Microsoft's suite of business solutions to revolutionize business operations. Our specialization in Dynamics 365 makes us uniquely equipped to transform your business operations, and our Discovery Session offers valuable insights to help your business achieve new levels of success.

By partnering with Definity First for your Dynamics 365 implementation, you can be confident that you are working with a team of experts dedicated to your success.

