DYNAMICS 365 SALES ONBOARDING
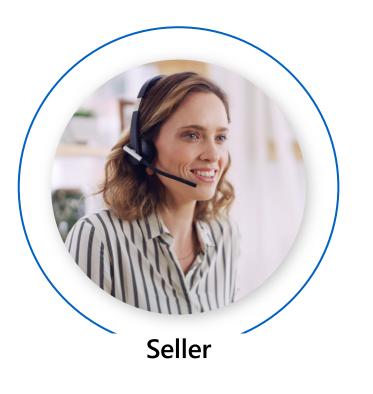
by Konica Minolta IT Solutions Czech

ONE–WEEK GUIDED PROGRAM THAT WILL SHORTEN INTERNAL ADOPTION OF YOUR CRM BY MONTHS

Empowering the entire sales team

Seller

Sales manager

Sales operations manager

6–PHASE CURRICULUM

1

Analytical workshop

Online meeting to map the customer needs and environment. Explanation of migration templates.
The output is recorded information for subsequent product parameterization.

2

M365 tenant setup and commissioning

The result is a working tenant with an environment where Dynamics 365 Sales is installed.

3

Set up of the organizational structure and user roles

The result is the installed product in the customer's environment, including the defined structure of organizational units (branches/departments/users). Users are assigned security roles.

4

Migration of Accounts and Contacts

We will import these two types of records into the application via migration templates created at Analytical workshop and populated by customer. The result of this phase is a live Dynamics 365 Sales application populated with your Accounts and Contacts.

5

Training on the basics of using Dynamics 365 Sales

Online training of typical operations using Accounts, Contacts, Activities, Leads and Opportunities for a total of up to 4 hours. A recording of the training will be made available afterwards.

6

Hypercare

The post-deployment remote support budget of 8 hours, which can be drawn upon within two weeks after users have been trained.

Thank you for joining us.