

Dynamics 365 Sales and Marketing Foundations



Dynamics 365 Sales and Marketing Foundations by NexTec is a starter kit designed to get your CRM up and running quick. Your users will be able to navigate the system and start seeing the power of their efforts. Simple instructions. No tech jargon. No installation hassles. The key to getting a solid, quick start in CRM is having a firm foundation.

Package total: \$8000

	Process	Deliverables
Discovery and Design (Days 1 - 2)	Together, we'll discuss what you need from your CRM system. We'll show you the out-of-the-box solution and how we can tailor it to your needs.	<ul style="list-style-type: none">• Consultation write-up• Design documentation
Installation and Configuration (Days 3 - 5)	We'll guide you through installing and setting up your CRM system.	<ul style="list-style-type: none">• 20 custom fields• 2 custom entities• 2 configured workflows or notifications• 1 configured business process
Data Transfer and Report Setup (Days 6 - 7)	We'll walk you through transferring your data and setting up your reports.	<ul style="list-style-type: none">• Data import templates provided for Account, Contact, Lead• 4 configured dashboards
Launch and Training (Days 8 - 10)	It's time to launch. We'll provide training for your end-users, administrators and technical team.	<ul style="list-style-type: none">• End-user training• Dashboard creation training• Data transfer training• Technical training (Outlook set-up)
Support (Post-Launch)	After we launch your CRM solution, you'll receive 4 hours of support to keep your CRM running smoothly.	