



Time Required: 1 week



Description: The QuickStart Basic Implementation Package is for businesses who need CRM functionality for their sales team. This package provides assistance with the provisioning of your Dynamics 365 for Sales instance, data conversion using our templates, module setup and training. You will have access to both a Senior Project Manager and a Certified CRM Consultant. It is intended for a single legal entity and is a great way to quickly get up and running. At the end of this one week engagement, we will identify additional recommendations as needed.

Implementation topics include:

- Leads
- Opportunities/Pipeline Management
- Accounts
- Contacts
- Process Flows
- Activity Tracking

Imported Data:

- Accounts
- Contacts
- Opportunities
- Leads

CONTACT US >

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