



Solution Review for Dynamics 365 Sales, Service, and Marketing

Proactive Operations Program | 1 - 5 Days | Remote or Onsite | Level 300 - Advanced

Description

The Solution Review engagement is a review of your deployed Dynamics 365 solution. The goal is to help you understand the key functional and technical solution areas where optimization is needed. We will help you identify where differences exist between Architectural design, business processes and application functionality. We will also review your deployed solution through operational interviews and technical analysis. Finally, we will provide Optimization recommendations for prioritized scenarios to help improve the health of your solution and enhance the overall value that Dynamics 365 brings to your business.

NOTE: This requires a scoping call to ensure that the delivery aligns with the customer's needs.

Objectives

- Understand the prioritized usage scenarios within the Dynamics 365 solution.
- Highlight opportunities for optimization based on best practices.
- Map optimizations against business objectives and organization priorities.

Outcomes

- A roadmap for Dynamics 365 solution optimization and improved business value.
- Identification of Microsoft services (MIPs) for further in-depth analysis of implemented solutions.

Methodology

- **Ramp up** - Review your current solution to define the context for improvement.
- **Evaluate and learn** - Identify and evaluate opportunities for improvement by participating in review sessions.
- **Plan and implement** - Align solution improvement recommendations to the business objectives and business priorities. Deliver a customized roadmap for improved solution health and business value.

Agenda

- Introduction
- Review prioritized solution scenarios.
- Discuss possible optimizations using Solution Review sessions.
- Map optimizations against business objectives and organization priorities.
- Review optimization roadmap for prioritized solution scenarios.
- Close out and plan for next steps.