01 / Prepare for implementation

A CRM should make selling clearer, not add another reporting chore. Use this planning guide to agree sales stages, clean customer data and prepare your people before rollout.

Dynamics 365 Sales

A practical readiness guide

For business owners, process leaders and the people who will use and support the solution. Use this guide to settle responsibilities, surface dependencies and prepare a focused implementation conversation.

BEFORE	DURING AND AFTER
Agree the process	Validate the complete business journey, including exceptions and approvals.
Prepare the information	Rehearse migration, reconcile critical records and confirm ownership.
Prepare the people	Test real roles, support the first operating cycles and agree how improvement will be measured.

Scope before software

Professional, Enterprise and Premium serve different needs. Advanced intelligence, agents, capacity and connected products depend on the chosen offer. We compare your requirements with current Microsoft terms before recommending licenses.

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Planning reference only. Product features, licensing and local requirements must be confirmed for your deployment. This guide does not replace an agreed statement of work or a detailed implementation plan.

02 / Settle the important decisions

Bring the owners of these areas into discovery. For each decision, record the current situation, the intended process, dependencies and who can approve the design.

DECISION AREA	WHAT TO PREPARE
Sales process	Agree entry and exit criteria for each opportunity stage, required next actions and the owner of stalled deals.
Customer data	Deduplicate accounts and contacts, decide account hierarchies and record rules for ownership and inactive records.
Commercial handover	Decide where quotation, credit checks, order creation and invoicing occur; define the point at which sales hands over responsibility.
Forecast discipline	Agree forecast categories, review cadence and required update dates; capture a baseline before promising improvement.
Seller adoption	Test a real lead-to-win journey with salespeople and managers, including lost opportunities and reassignment.

Record one measurable outcome

Choose a practical measure related to the problem you are solving. Define its calculation and source, record a baseline and agree a review date. Avoid treating a software feature as a business result.

Outcome and baseline: ____

Business owner: ____

Target and review date: ____

Decision gate

The business sponsor accepts the scope, owners and assumptions. Critical unresolved decisions have a named owner and a date for resolution.

03 / Use a visible delivery plan

Agree what evidence will be reviewed at each stage. The implementation team prepares the work; the relevant business owners accept whether it meets the agreed need.

STAGE	WORK AND ACCEPTANCE
Discover	Review lead sources, sales cycles, account structures and reporting habits. Agree what better selling visibility means for your organization. Gate: sales process and CRM scope approved
Design	Define opportunity stages, customer ownership, permissions and ERP handover. Decide which fields genuinely support a decision. Gate: process and data design accepted
Configure & test	Configure the CRM, rehearse migration and test qualification, quotation, reassignment and close scenarios. Gate: sales scenarios and migrated data accepted
Coach & launch	Train sellers and managers using their daily tasks. Pilot the process, resolve adoption barriers and confirm support routes. Gate: business and user readiness approved
Review & improve	Monitor data completeness, usage and pipeline discipline. Use feedback from sales reviews to prioritize improvements. Gate: ownership and improvement backlog agreed

Keep change decisions explicit

Record a requested change, why it matters, affected users, alternatives and its effect on cost, schedule and support. Separate approved scope from the future improvement backlog. Do not let informal requests silently change acceptance criteria.

Name both sides of each handoff

For integrations and cross-team processes, identify who sends information, who accepts it and who responds if it fails. A technically successful exchange can still carry the wrong business meaning.

04 / Test the business, not just the screens

Select representative scenarios from your own organization. Include ordinary work, corrections, handovers and the situations that are difficult in the current process.

CHECK	EVIDENCE TO KEEP
Process acceptance	Scenario, responsible owner, inputs, expected result and observed result. Include at least one meaningful exception for each critical process.
Data quality	Mapping, record counts or control totals, sample business checks and accepted treatment of historical records.
Roles and access	Tests for each real role, restricted records and approval boundaries. Confirm what users cannot do as well as what they can.
Connected systems	Expected update timing, duplicate handling, failed messages, recovery and reconciliation. Test realistic volumes where relevant.
User readiness	Role-based practice, short job aids, trained internal champions and a support route users can explain.

Product-specific focus

Test a real lead-to-win journey with salespeople and managers, including lost opportunities and reassignment.

Do not leave acceptance implicit

Prioritize defects by business impact. Record the approver and rationale for any accepted workaround. Retest the correction and affected scenarios before closing the issue.

Test owner: ______________________ Acceptance date: _____________
Outstanding critical issue: ____
Decision and responsible approver: ________________________________

05 / Launch with a plan for support

A target date is not evidence of readiness. Rehearse the transition, agree the go/no-go authority and keep implementation expertise available through the first important operating cycles.

WHEN	WHAT TO AGREE
Before launch	Task sequence, owners, data timing, user communication, support contacts and criteria for pausing or recovering the transition.
First 30 days	Prioritize issues by business impact, validate critical records and support users through the first real operating cycles.
Days 31-60	Complete handover, resolve recurring problems and update job aids. Confirm monitoring and escalation ownership.
Days 61-90	Compare early performance with the baseline and agree an improvement backlog. Set a manageable review cadence.

Define support before it is needed

Agree coverage, response arrangements and the distinction between defects, user questions, data corrections and new requirements. Assign ownership for integrations, access changes, product updates and periodic review.

Bring these details to your first conversation

Current systems and major pain points; business locations and user roles; key process owners; connected providers; known data issues; desired outcomes and timing constraints.

Plan the next step with Tripearltech.

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