

Supercharge Your Sales with AI

2-Week Quick Starter Package for Microsoft Dynamics 365 Sales

HITACHI

The Offer

In today's competitive business environment, leveraging technology to optimize sales processes is crucial. Our 10-business-day Quick Starter Package for Microsoft Dynamics 365 Sales is designed to redefine your operations, streamline lead and opportunity management, and enhance productivity through automation and AI-driven insights.

The package provides a comprehensive setup that empowers your sales team to efficiently close deals faster by utilizing intelligent tools and workflows.



Why Hitachi Solutions?

Hitachi Solutions is a global systems integrator with leading capabilities in Microsoft solutions and technologies. Our professionals combine advisory services, industry and technology expertise, and implementation excellence that encompass our customers' people, processes, business applications, and technologies to support and accelerate their data and business system modernization initiatives.

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Contact Hitachi Solutions today to get started!

Week 1: Setup and Configuration

Day 1: Discovery and Planning

- Conduct discovery sessions to align business objectives.
- Define success metrics for the Dynamics 365 Sales implementation.

Day 2: Feature and Functionality Overview

- Demonstrate Dynamics 365 Sales features, including Sales Copilot.
- Provide examples of AI-driven insights and automation capabilities.

Day 3 and 4: Lead Management Configuration

- Enable lead generation and configure lead scoring with predictive analytics.
- Set up business process flows and rules for lead qualification and assignment.
- Implement lead sequencing and unique ID generation.
- Use Copilot for quick summary.

Day 5: Opportunity Management Configuration

- Enable opportunity management features and scoring with AI.
- Configure business process flows, assignment rules, and sequencing.
- Generate unique IDs for opportunities and leverage AI for summaries.
- Use Copilot for quick summary

*Assumption: leverage out-of-the-box functionality, happy scenario testing.
Pre-requisites: environment readiness, user setup, and shared mailbox for notifications (if needed).*

Week 2: Integration, Training, and Testing

Day 6: Account and Contact Management

- Configure account and contact management with out-of-the-box fields.
- Ensure seamless integration with lead and opportunity management.

Day 7: Activities and Interactions Setup

- Configure activity records such as emails, phone calls, tasks, appointments, and notes.
- Enable linking of activities to CRM records for comprehensive tracking.
- Enable Dynamics 365 for Microsoft Outlook.
- Enable Microsoft Teams integration.
- Enable Microsoft SharePoint integration.
- Mailbox configuration for up to 2 users.

Day 8: Dashboards and System Settings

- Activate dashboards for real-time insights and visualization.
- Configure system settings for formats, auditing, security roles, and permissions.

Day 9: User Training, User Testing, and Mobility

- Conduct a day of user training focused on system usage and best practices.
- Introduce standard out-of-the-box mobile app for on-the-go access.
- Perform user testing.

Day 10: Go Live Preparation

- Fix bugs and finalize preparations for go live.
- Deployment and go live.

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