

MUST-ASK QUESTIONS FOR SUMMIT ATTENDEES

Technology Management Concepts

BOOTH #1226 | ABOUTTMC.COM



CHARLOTTE, NC
OCTOBER 15-20, 2023

QUESTIONS TO ASK IF YOU'RE LOOKING FOR A NEW PARTNER



***PARTNER NAME:**

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EXPERIENCE

Can you share details about your experience with Microsoft Dynamics implementations, especially in our industry?

How many years of experience does your organization have, and can you provide examples of successful projects similar to ours?

COMPETENCY

Do you have any customer testimonials or case studies showcasing your past performance?

QUESTIONS TO ASK IF YOU'RE LOOKING FOR A NEW PARTNER



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COMPETENCY

What awards or recognitions have you received for your digital transformation work?

Can you describe your Microsoft Gold Competencies and how they align with our needs?

SPECIFIC INDUSTRY EXPERTISE

Have you worked with other clients in our industry? If so, what solutions or strategies have you implemented for clients in our industry that led to successful outcomes?

QUESTIONS TO ASK IF YOU'RE LOOKING FOR A NEW PARTNER



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CUSTOMIZATION FOR COMPLEX PROJECTS

Can you tailor solutions for unique business needs and requirements?

Share examples of customized solutions that you've implemented.

TECHNICAL & LEVEL OF SUPPORT

What can we anticipate in terms of technical assistance during and after the implementation?

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TECHNICAL & LEVEL OF SUPPORT

How do you ensure that the implementation will be customized to our specific business requirements?

Can you explain your approach or methodology for providing ongoing services to clients?

What level of collaboration can I anticipate by partnering with you and our team?

QUESTIONS TO ASK IF YOU'RE LOOKING FOR A NEW PARTNER



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INTEGRATION EXPERTISE

Do you have experience with integrating specific applications like... _____

ISV PARTNERSHIPS

What partnerships do you have with Independent Software Vendors (ISVs) that can integrate with our ERP system?

How flexible are you in working with our current ISV partners?

QUESTIONS TO ASK IF YOU'RE LOOKING FOR A NEW PARTNER



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USER TRAINING AND SUPPORT

What training resources do you offer to help our team adapt to the new system?

Do you offer user experience (UX) testing to optimize usability?

CASE STUDIES AND CLIENT REFERENCES

Do you have examples of clients who have successfully transitioned to Dynamics 365 solutions with your help?

QUESTIONS FOR REPLACING ERP/CRM SYSTEMS



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SYSTEM FUNCTIONALITY

How does [Inquiring ERP/CRM system] compare in terms of functionality to our current system?

Can you provide a detailed feature-by-feature comparison?

DATA MIGRATION

What is your process for migrating our existing data to the new system?

QUESTIONS FOR REPLACING ERP/CRM SYSTEMS



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DATA MIGRATION

How do you ensure data integrity and minimal disruption during the migration?

CUSTOMIZATION AND SCALABILITY

How easily can the system be customized to fit our unique business processes?

Is it scalable to accommodate our growth and changing needs?

USER TRAINING AND SUPPORT

What training programs or resources do you offer to help our team transition to the new system?

QUESTIONS FOR REPLACING ERP/CRM SYSTEMS



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USER TRAINING AND SUPPORT

What level of ongoing support can we expect post-implementation?

DATA SECURITY AND COMPLIANCE

How do you address data security and compliance requirements, especially in our industry?

COST AND ROI

What is the total cost of ownership, including licensing, implementation, and ongoing fees?

Can you provide examples or case studies of clients who have seen a significant return on investment (ROI) after implementing your system?

QUESTIONS FOR REPLACING ERP/CRM SYSTEMS



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USER EXPERIENCE

Can we see a demo of the system to evaluate its user-friendliness?

Have you conducted user experience (UX) testing to optimize the system's usability?

REFERENCES AND CASE STUDIES

Do you have case studies that demonstrate successful replacements in similar industries?

QUESTIONS ONLY A CONSULTANT CAN ANSWER



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DATABASE INTEGRATION

How can we integrate our existing SQL Server database to ensure data consistency?

CUSTOMIZATION LIMITS

What are the limitations in terms of customizing forms, fields, and workflows?

DATA MIGRATION STRATEGY

What strategies do you recommend for migrating our historical data from our legacy system while maintaining data integrity?

QUESTIONS ONLY A CONSULTANT CAN ANSWER



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PERFORMANCE OPTIMIZATION

How can we optimize the performance of our Dynamics 365 instance, especially when dealing with large datasets and complex reports?

SECURITY MODEL

Can you help us design and implement a robust security model, ensuring that user roles and permissions align with our organizational structure?

SCALABILITY PLANNING

How can we ensure that our Dynamics 365 solution is scalable to accommodate future growth, both in terms of data volume and user base

QUESTIONS ONLY A CONSULTANT CAN ANSWER



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OFFLINE ACCESS

What options are available for users who need to access data while offline, and how can we set up and manage this functionality?

UPGRADING AND PATCHING

How do you recommend handling system upgrades and patching to ensure minimal disruption and maintain compatibility with customizations?

DATA BACKUP AND RECOVERY

What's the best practice for regular data backup and disaster recovery planning?

QUESTIONS ONLY A CONSULTANT CAN ANSWER



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REPORTING AND ANALYTICS

Can you help us set up advanced reporting and analytics tools, including Power BI, to derive meaningful insights from our data?

USER TRAINING AND ADOPTION

What strategies do you recommend for user training and ensuring high user adoption rates of the new Dynamics 365 system?

CUSTOM PLUGIN DEVELOPMENT

In what scenarios would it be beneficial to develop custom plugins for Dynamics 365, and how can we go about it?

QUESTIONS ONLY A CONSULTANT CAN ANSWER



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COMPLIANCE AND DATA GOVERNANCE

What measures can we implement to ensure that our use of Dynamics 365 complies with industry regulations and data governance standards?

M365 MIGRATION FROM GMAIL OR GOOGLE DOCS

How complex is a migration from Google to M365? What will it take to move our email data?

AZURE STORAGE

What types of things can I store on the Azure cloud?

**NOTES
FOR
OTHER
QUESTIONS**



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