MUST-ASK QUESTIONS
for Assessing a Microsoft Solutions Partner at
Community Summit

Technology Management Concepts

BOOTH #927 | ABOUTTMC.COM

COMMUNITY SUMMIT
SAN ANTONIO
SUMMIT NA
2024

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The RIGHT Size Microsoft Partner

QUESTIONS TO ASK A
NEW MICROSOFT
SOLUTIONS PARTNER

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*PARTNER NAME:

_____

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 A NEW MICROSOFT SOLUTIONS PARTNER

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COMPETENCY

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

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 A NEW MICROSOFT SOLUTIONS PARTNER

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CUSTOMIZATION FOR COMPLEX PROJECTS

Can you tailor solutions for unique business needs and requirements? What solutions would you recommend for us?

Share examples of customized solutions that you've implemented.

QUESTIONS TO ASK A NEW MICROSOFT SOLUTIONS PARTNER

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TECHNICAL & LEVEL OF SUPPORT

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

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 A NEW MICROSOFT SOLUTIONS 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?

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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?

COHESIVE ERP & CRM TEAM

How do your ERP and CRM teams collaborate to ensure seamless integration and support across all Microsoft systems?

QUESTIONS TO ASK A NEW MICROSOFT SOLUTIONS PARTNER

> **COHESIVE ERP & CRM TEAM**

Can you provide examples of projects where your cohesive team approach led to successful outcomes?

How do you avoid the pitfalls of siloed departments to ensure a unified strategy for managing and implementing business systems?

QUESTIONS FOR
REPLACING ERP/CRM SYSTEMS

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

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

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

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

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

LEARN FROM OUR EXPERTS!

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BOOTH #927| ABOUTTMC.COM

Find us at booth #827!

DID YOU PLAN YOUR VISIT?

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Dive into our educational sessions!

MON

10.14.2024
2:30 PM - 4:00 PM
📍 **221B**

ERP Horror Stories: Lessons to Avoid The Most Common Causes of Implementation Failures

- **Learn** the most common causes of implementation or migration failure.
- **Learn** the red flags to watch out for before, during and after an implementation.
- **Learn** the best practices from successful projects.
- **Learn** how to work with your Partner to ensure success.

TUE

10.15.2024
10:00 AM - 10:30 AM
📍 **220 - Cantilever**

Business Central Assembly or Production? Questions to help get you to the answer

- **Learn** the differences in Assembly vs. Production
- **Learn** what processes require Production, instead of Assembly?
- **Learn** When do we use Production over Assembly?

10:00 AM - 10:30 AM
📍 **218**

Model-Driven Apps Config Best Practices: Low Code but High Impact!

- **Learn** practical tips for configuring model-driven apps using low-code approaches
- **Understand** the impacts of key configuration settings in model-driven apps
- **Learn** Top 10 low-code configuration best practices

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Dive into our educational sessions!

WED

10.16.2024

8:00 AM - 9:00 AM

📍 **225B**

15 Things You Should Know How to Do in Business Central

- **Learn** how to optimize common BC functionality and gain daily and month end efficiencies
- **Learn** how to manage setups like Number Series and Posting Date Ranges
- **Leverage** capabilities between BC, Outlook, and Teams

OUR SPEAKERS

Jennifer Harris | CEO & President at TMC

Join Jennifer as she shares her 35+ years of experience and knowledge in the ERP space. She's witnessed many changes and technological evolution and aims to empower businesses with innovative solutions.

Ting Ma | Sn. BC Application Consultant at TMC

Ting is a returning Summit speaker well-versed in sharing invaluable insights bout BC. With 8+ years as a consultant, she will leverage her NAV and BC knowledge to empower users in maximizing their systems.

Brigitte Maheu | Sn. D365 CRM Application Consultant at TMC

With over 17 years of experience in the CRM industry, Brigitte is sharing her wealth of knowledge and experience on Dynamics 365 and the Power Platform to help users optimize their business processes.

NOTES