



**LISTEN**



**UNDERSTAND**



**KNOW**



**CONNECT**



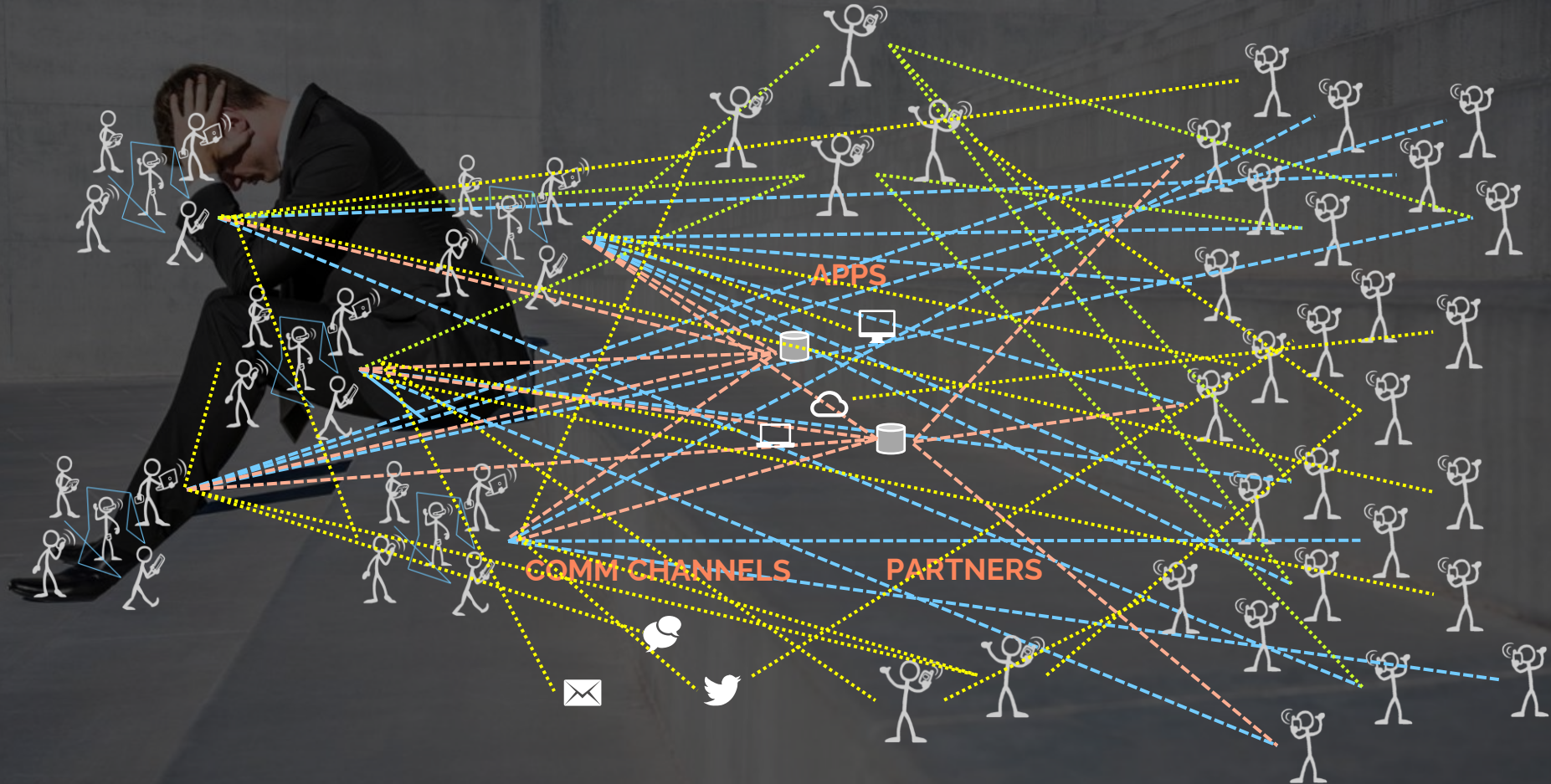
**C5insight**

**7 Habits for a Successful  
Dynamics 365 CRM (Re)Launch**

EMPLOYEES

LEADERSHIP

CUSTOMERS

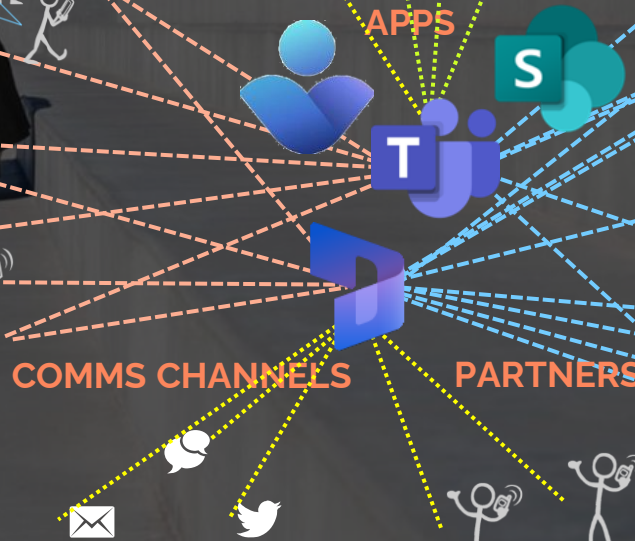
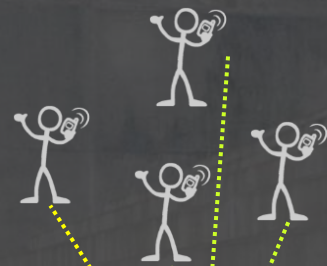




EMPLOYEES

LEADERSHIP

CUSTOMERS



APPS

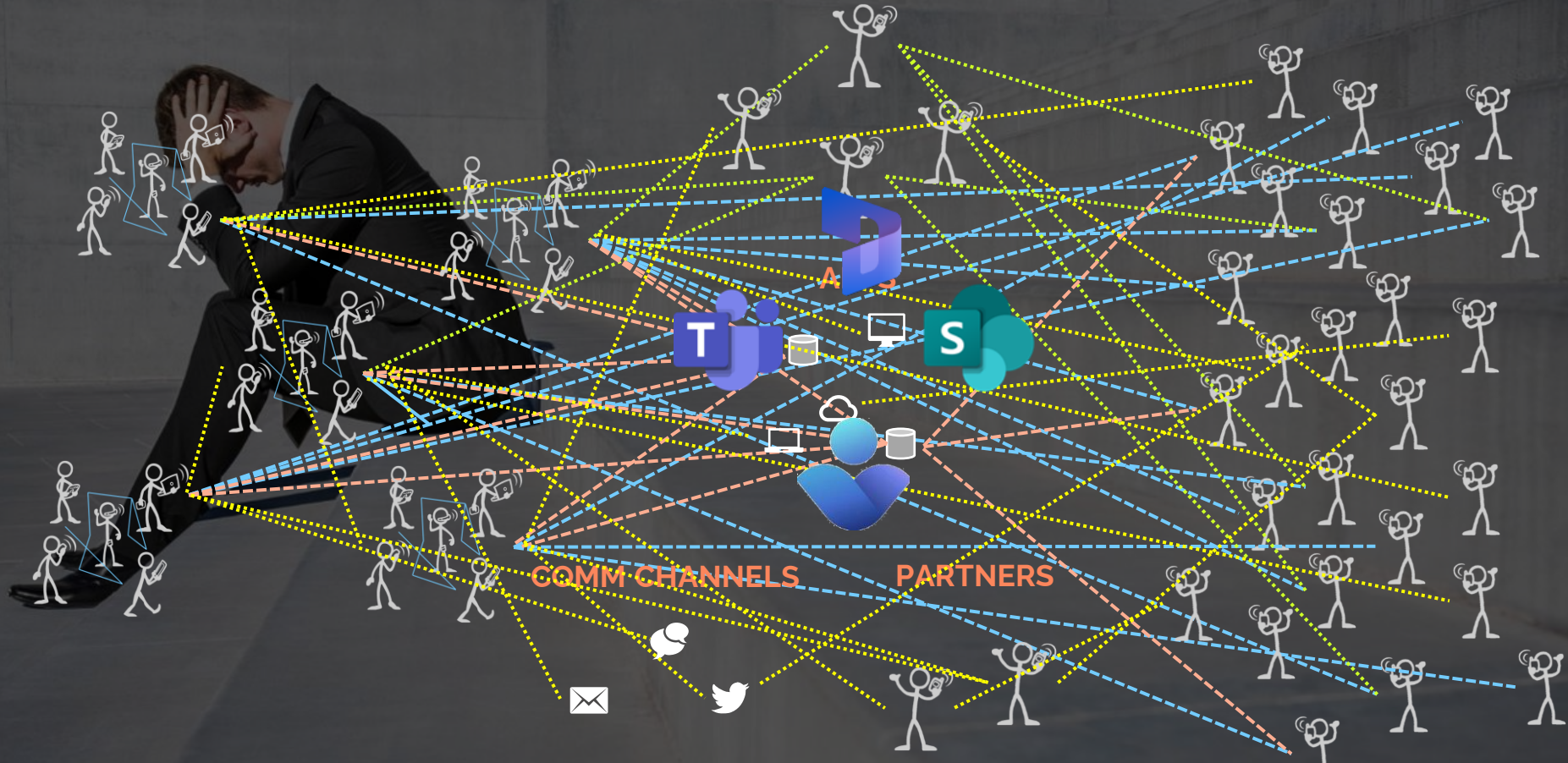
COMMS CHANNELS

PARTNERS

EMPLOYEES

LEADERSHIP

CUSTOMERS



COMM CHANNELS

PARTNERS

e-Book: CPR for CRM



# Speaker Intro




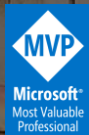
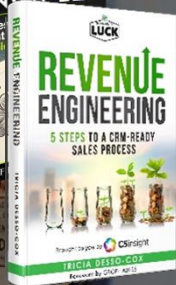
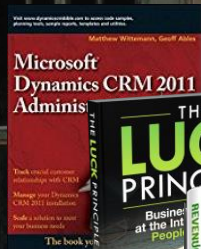
**Geoff Ables**  
**C5 Insight**

Entrepreneur, Advisor, Author, Speaker  
**Customer and Employee Experience**

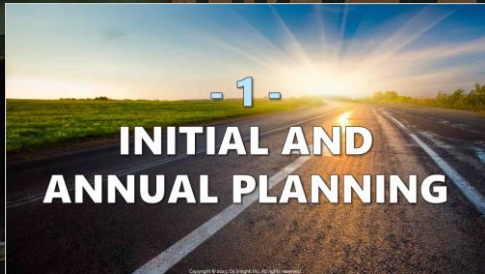
geoff@c5insight.com

704.281.8067

 /in/ables







**Downloadable Resources**



- 1 -

# INITIAL AND ANNUAL PLANNING

# 81%

of organizations are weak in Digital Management, Digital Leadership or both.

Of the 19% that are strong in both – they are more likely to show:

- **REVENUE GROWTH > 10%**
- Presence of a **DIGITAL COACH**
- A clear **DIGITAL VISION**

**Recorded Webinar:**  
Digital Leadership

Harvard Business Review





A

**DIGITAL COACH**

creates a clear

**DIGITAL VISION**

that results in

**REVENUE GROWTH > 10%**

# **DIGITAL VISION**

## **INITIAL ROADMAP AND ANNUAL PLANNING**



# HOW DO WE BUILD A DIGITAL WORKPLACE ROADMAP? The Roadmap to Better Roadmaps



Whether you're building a first roadmap, re-launching after a failed project, or beginning a new phase, the principles for developing a good roadmap are the same.



## 1. Collaborate

Give a broad cross-section of the team a voice in determining how the digital workplace should be used by the organization.

LISTEN

## 2. Business Analysis

Distill the knowledge, insights and priorities from the team into an understanding of the situation and a vision for the future.

UNDERSTAND

## 3. Document

Transform the analysis into an initial plan including situation, phases, fit/gap and change management.

CONNECT

## 4. Validate

Verify the findings through additional collaboration and an agile approach for frequent course correction.

KNOW

# Visionary Demo: Art of the Possible

Consider starting with a demo to help your team expand their boundaries, more fully understand what is available, and unleash their imagination.

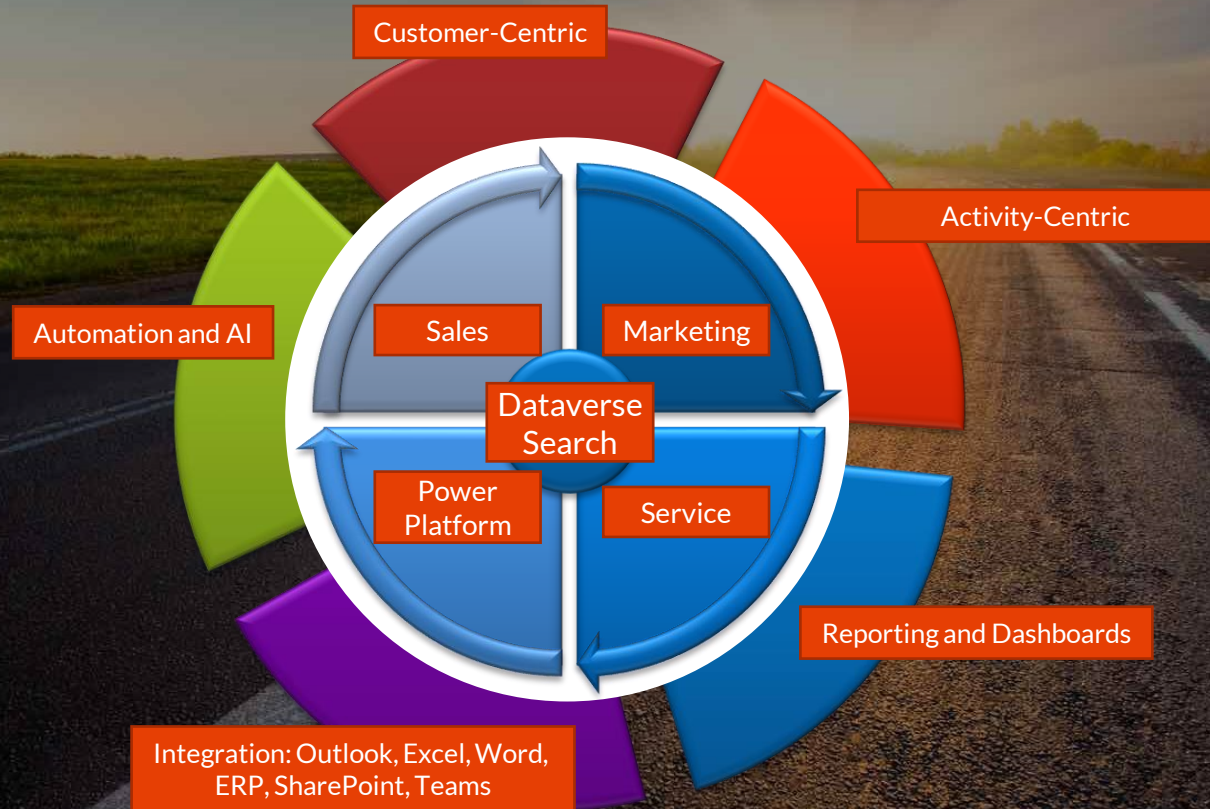
- Simple: Use pre-recorded visionary demos and slides
- Best Practice: Have some custom (POC) elements



# Dynamics 365 CE - Visionary Demo

*Click Orange Boxes for Examples*

These samples are taken from the C5 Insight growing library of over 115 short demo videos.



# PLANNING

- Workshops: Engage Leaders and Users

| Obstacle  | 1 | 2  | 3  | 4     | 5     |
|---|---|----|----|-------|-------|
| Stakeholder <del>Buyer</del> <sup>Admin</sup> ① |   |    | •  | •     | ••••• |
| Change Mgmt ②                                   |   |    | •• | ••    | ••••• |
| Resources/Priority ⑦                            |   |    | •• | ••••• | ••    |
| Business Continuity ⑥                           |   | •• | •• |       | ••••• |
| Training ③                                      |   |    | •• | ••    | ••••• |
| Communication ④                                 |   | •• | •• | ••    | ••••• |
| Consensus ⑧                                     |   | •• | •• | ••    | ••    |
| Commitment to follow thru ⑨                     |   | •• | •• | ••    | ••••• |
| Performance ⑤                                   | • | •  | •• | ••    | ••    |



The image shows two side-by-side screenshots of a project management application. Each screenshot displays a list of tasks with progress bars and a star icon. Below each screenshot is a user profile picture and the name of the team: Sales and Marketing. Both teams are noted as being modified 6 months ago.

**Sales**  
Modified 6 months ago

**Marketing**  
Modified 6 months ago



# THE ROADMAP



## Executive Summary

41 pages summarizing findings, recommended plan, architecture, governance, and estimated costs/timing.



## Dynamics 365 Roadmap

Detailed recommendations, findings and roadmap. 73 pages. Includes Audience Guide.



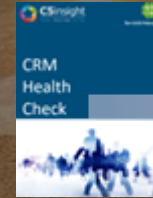
## LUCKSTORMING Results

111 pages of notes and screenshots from 6 meetings – including prioritization grids



## Benchmarking Findings

21 pages of analysis and recommendations based upon the change management benchmarking survey



## Health Check Findings

21 pages of analysis and recommendations based upon system audit



## Research References

1 page guide to articles used to create ROI calculations.



## Phase I Project Plan

40-page project plan (PDF) used to create detailed phase I estimate.

# PROJECT PLANS

Be the example of transformation you want to inspire in others.

- Simple: Planner
- Moderate: Project Hub
- Complex: PMO

Warsaw IT Days Presentation:  
4 Ways to Manage Projects with M365





- 2 -

# PROCESS DESIGN AND AUTOMATION



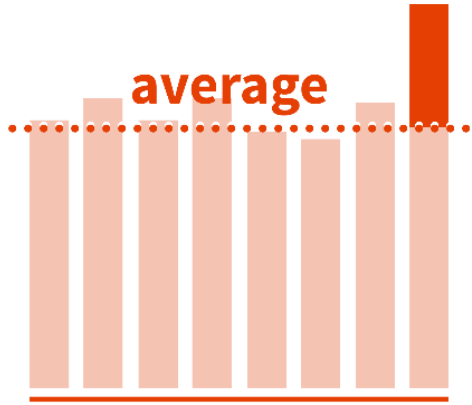
**WHY**

DO WE NEED

A (NEW)

**SALES  
PROCESS?**





Profit results are 30% greater for firms using a sales process than for those that are not.

- The Sales Management Association



If you follow up with web leads within 5 minutes, you're 9x more likely to convert them.

- InsideSales.com

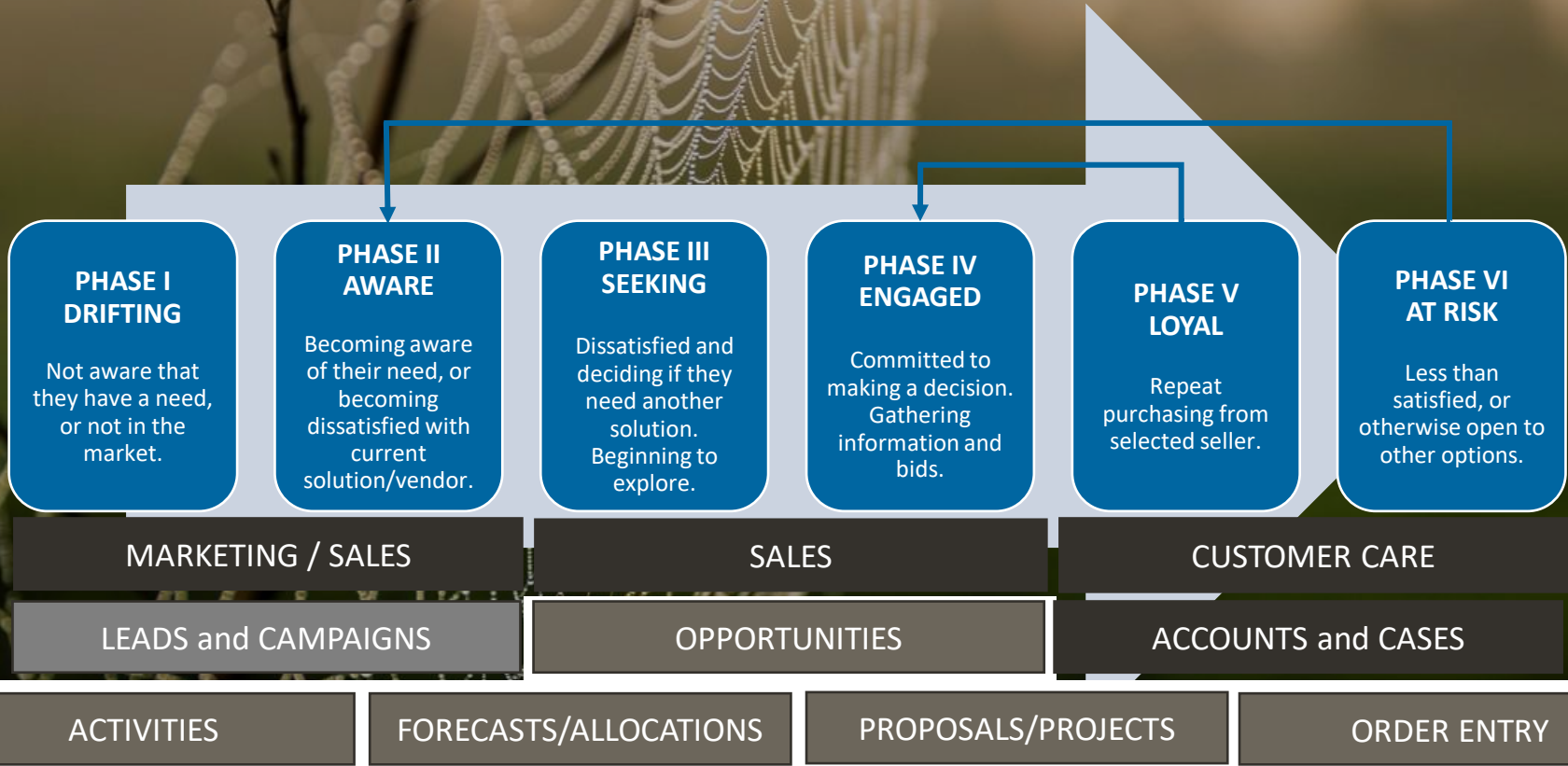


80% of sales require 5 follow-up calls after the meeting. 44% of salespeople give up after 1 follow-up.

- The Marketing Donut

# Customer Journey

Are we focused on the correct process?







# Build LUCK Into Your Sales Process

**DATA:** What data do you need during this stage to:

- qualify the customer?
- meet their needs?

Is there any data you can capture without asking the customer?

**DEVELOPMENT:** How will we forecast and improve?

Probability: \_\_\_\_\_%

Avg Duration: \_\_\_\_\_ weeks

Other KPIs to track for users and managers?

1



LISTEN

2



UNDERSTAND

4



KNOW

3



CONNECT

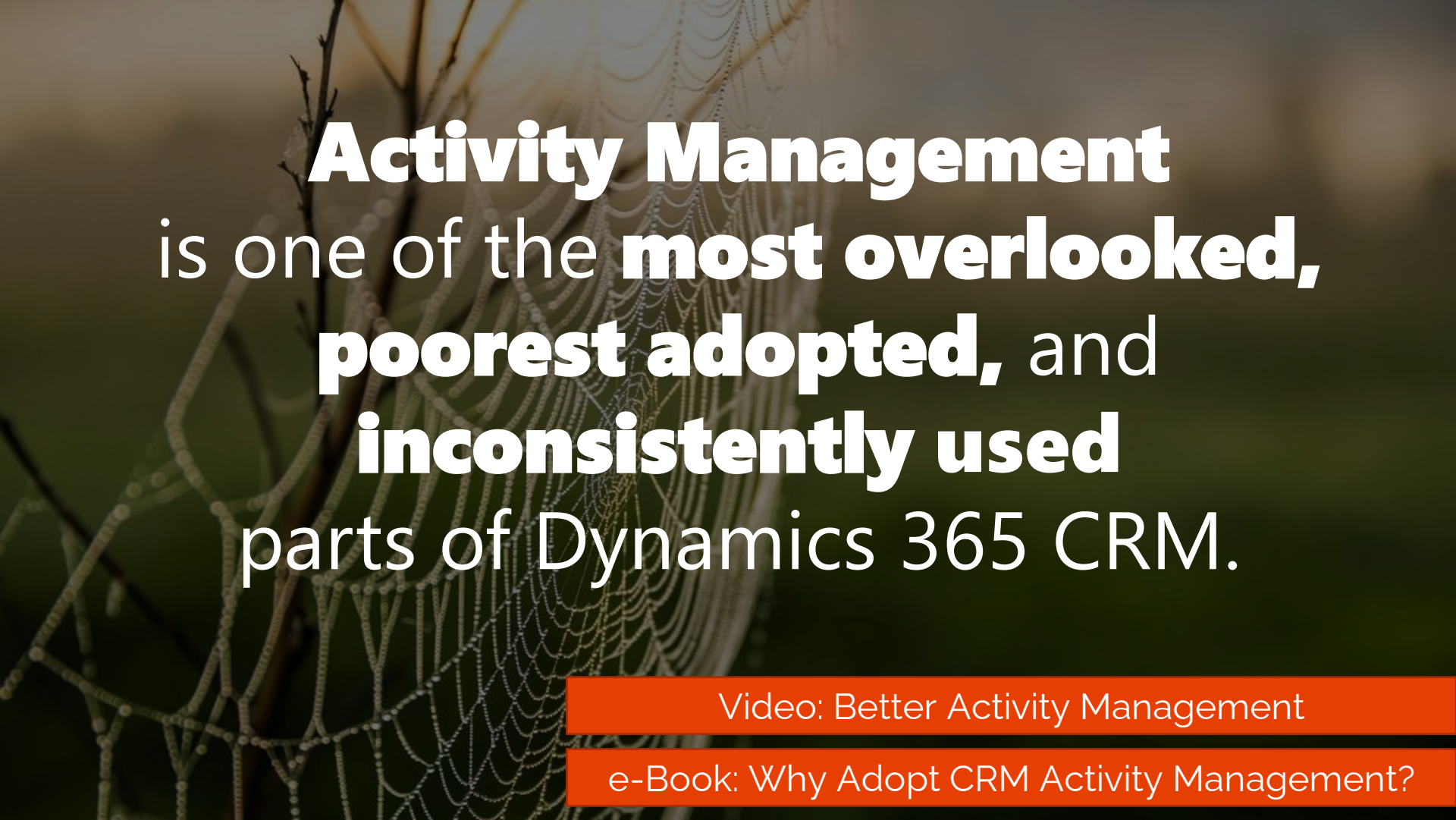
## DECISIONS

- What decisions can be made based upon info provided?
- What (if anything) could happen that would make you disqualify the opportunity at this stage?

## DELIVERABLES

- What activities and actions should take place?
- What deliverables and content will we bring to the customer?



A spider web is stretched across a branch, with a blurred background of more branches and foliage. The text is overlaid on the image in white, bold, sans-serif font.

**Activity Management**  
is one of the **most overlooked,**  
**poorest adopted,** and  
**inconsistently used**  
parts of Dynamics 365 CRM.

Video: Better Activity Management

e-Book: Why Adopt CRM Activity Management?



# Recent Microsoft Investments into Activity Management

- Viva Sales
- Mobile App for Sales
- Outlook App
- Enhanced Timeline
- Auto Capture
- Copilot
- Sales Accelerator
- Adaptive Sequences
- LinkedIn Integration
- Insight Cards
- Email Engagement
- Notes Analysis
- Relationship Analytics
- Talking Points
- Who Knows Whom
- Conversation Intelligence



80% of companies believe they deliver a superior experience. Only 8% of customers agree.

- Bain & Co



Employees with above average number of connections generate \$83,000 more revenue.

- MIT Research



Marketers who use process report success 466% more often than those who don't.

- Coschedule



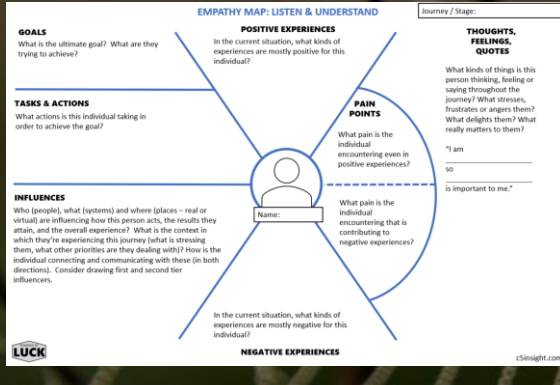
72% of first BPM projects generate a return within 2 years; faster with additional projects .

- AIIM



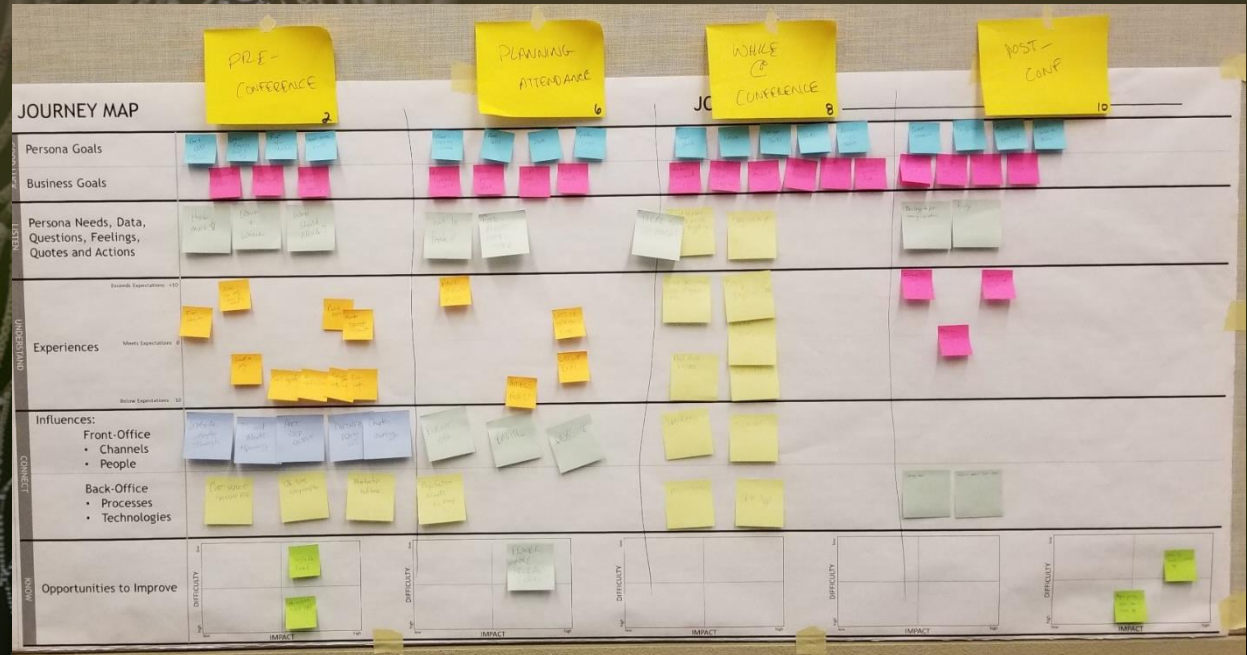
# Customer Journey Map: Understand the Full Experience

What process is the customer going through?



**CUSTOMER PERSONA NAME: "CORE"**

| LISTEN  | UNDERSTAND  | CONNECT  | KNOW  |
|---|---|--|---|
| <p>These things are typically true of the (firmographics / demographics):</p> <p>Age: _____</p> <p>Gender: _____</p> <p>Education: _____</p> <p>Income: _____</p> <p>Marital Status: _____</p> <p>Occupation: _____</p> <p>Interests: _____</p> <p>Values: _____</p> <p>What motivates this customer:</p> <p>Primary Motivation: _____</p> <p>Secondary Motivation: _____</p> <p>Needs and desires: _____</p> <p>What frustrates the customer: _____</p> <p>What frustrates the customer: _____</p> <p>What frustrates the customer: _____</p> <p>What frustrates the customer: _____</p> | <p>What are the key things this customer needs:</p> <p>What are the key things this customer needs:</p> <p>What are the key things this customer needs:</p> <p>What are the key things this customer needs:</p> <p>What are the key things this customer needs:</p> | <p>How do we connect or deliver the message?</p> <p>How do we connect or deliver the message?</p> <p>How do we connect or deliver the message?</p> <p>How do we connect or deliver the message?</p> <p>How do we connect or deliver the message?</p> | <p>What will success look like for this customer?</p> <p>What will success look like for this customer?</p> <p>What will success look like for this customer?</p> <p>What will success look like for this customer?</p> <p>What will success look like for this customer?</p> |



# Customer Experience Management

**LEISURE POOLS** Styles Colors Experience Technology Enhancements Presence **Affordability** Library Contact

## Receive a collection of inspiring possibilities.

First Name \* Last Name \*

Email \*

Comments

\* I have read and agree to the Leisure Pools P  
 I agree to receive electronic marketing mater

**Submit**

Homeowner - Aviva Pools - Jane McSmith - Saved  
Lead

**El Lead Sales Process** Active for 31 days Targeting (31 D)

Summary Address Details Files

Account Type: Homeowner

Existing Household? ---

Existing Contact? **Dealer** **Dealer Contact**

Household Account

Name  
Phone

Journey start  
All Brands - Open Homeowner Web Leads wit...

Send an email  
Explore Industries - Dealer Notification ...

Exit

Email

Select email \*  
Explore Industries - Dealer Notification New Ho...

Preview

**LEISURE POOLS**  
**AVIVA POOLS**  
**imaginepools**  
**Explore**

Send to \*  
Dealer Contact Email



# NECESSARY COMPLEXITY

- Business Complexity
- Deep Customization: Simple experiences can be complex to deliver

A low-angle, upward-looking photograph of several modern skyscrapers with glass facades, creating a sense of height and architectural complexity. The buildings are set against a cloudy sky. The perspective is from the ground looking up, with lines from the buildings converging towards the top of the frame.

- 3 -

# INTEGRATION

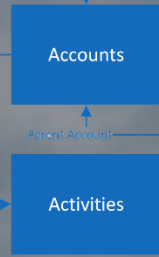
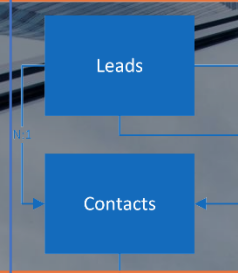
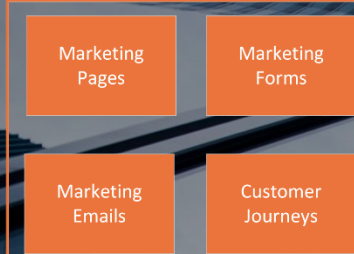




# INTEGRATION PLAN



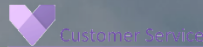
Marketing



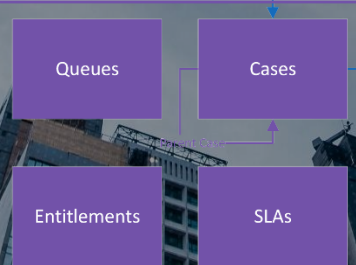
Sales



Business Central



Customer Service





# INTEGRATION

The screenshot displays the Dynamics 365 Sales Hub interface. On the left is a navigation pane with categories like Home, Recent, Pinned, My Work, Sales accelerator, Activities, Dashboards, Customers, Sales, Collateral, Marketing, and Sales. The main area shows a 'My work list' with a lead card for 'Halle Griffiths', a Facility Manager at Northwind Traders. The lead card includes a timeline with a 'Qualify (26 Hrs)' status and a 'Develop' button. Below the lead card is a 'CONTACT' section with fields for Topic, First Name, Last Name, Job Title, Business Phone, Mobile Phone, and Email.

The screenshot displays the Dynamics 365 Business Central interface. At the top, it shows 'Adatum Corporation' with account details and a navigation bar for Business Central, Project Price Lists, Assets and Locations, Details, Servicing, Files, and Related. The main area shows a 'Customer Card' for '10000 · Adatum Corporation' with a warning message: 'There was a problem synchronizing Payment Terms Code with Dataverse. This is probably because one or more option mappings are missing. Learn more'. The card is divided into sections: General, Address & Contact, and Dynamics 365 Sales Statistics. The General section includes fields for Name, Credit Limit (\$), Total Sales, and Costs (\$). The Address & Contact section includes fields for Address, Phone No., Mobile Phone No., Email, and Home Page. The Dynamics 365 Sales Statistics section shows Opportunities (1), Quotes (0), and Cases (0).

Article: Enhanced D365 + Teams Integration

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# MASTER DATA MANAGEMENT



2006  
0.16zb

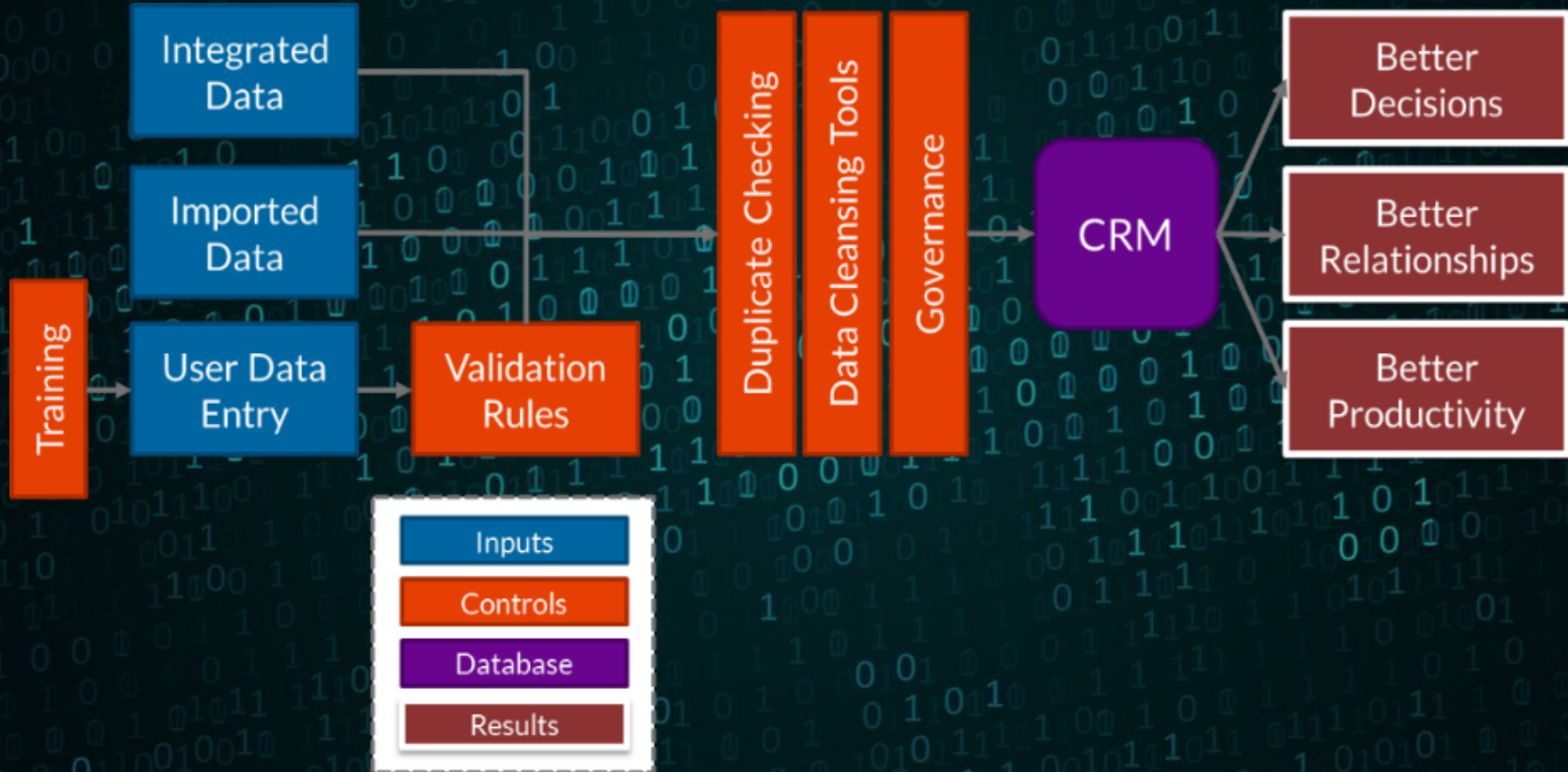
2016  
4.4zb

2025  
175zb

53% - 80% ROTII

# MASTER DATA MANAGEMENT

Full Control of Dynamics 365 Environment





# SYSTEM OF RECORD

Goal: Each user has a single primary application to get their job done.

Customer-facing users use the customer-facing app (CRM).

Back-office-facing users use the back-office-facing app (ERP).

# SYSTEM OF RECORD

## Master Data Management Policies

NOCO Energy Corporation



### Systems of Record

As part of developing master data management policies, every organization must determine the system controlling the master data. These systems of record are the source of the "true" information for each data table in CRM.

#### Definition of Customer

- **Customer:** Any person or business that has had service at a
- **New:** Location that is being delivered to in last X (days/week)
- **Last:** Not ordered any product in last 12 months
- **Reinstate:** Someone who 'dropped' for 12 months but return
- **Cross:** [redacted] new vs. Division specific

| CRM Table | System of Record                          | Notes          |
|-----------|---|----------------|
| Lead      | CRM                                       | Cu             |
| Account   | NAV<br>ZOH0?<br>Service Titan?            | Sta<br>CR      |
| Contacts  | CRM [redacted]<br>ZOH0?<br>Service Titan? | NA<br>To<br>Ma |

System of Record

## Master Data Management Policies



### Activity Open Records Review

Targeted Team: All  
Review Cadence: Monthly  
Procedures:

- Review views outlined below
- Update information or status as needed

View Parameters:

- Open Activities with No Due Date
  - Activity Status equals "Open"
  - Due Date Does Not Contain Data
- Open Overdue Activities
  - Activity Status Equals "Open"
  - Due Date Older than X Days 1
- Open Activities for inactive owners
  - Activity Status Equals "Open"
  - Owner status equals "Inactive"

Notes:  
Current Status:

- Policy Last Modified Date
  - Modified on 05/19/2022
  - Modified by Malcolm McAuley (C5 Insight)
- View
  - Name: xx
  - Owner: xx
- Chart
  - Name: xx
  - Owner: xx
- Dashboard
  - Name: xx
  - Owner: xx

Data Policies

| Subject                                    | Repeating       | Activity Type | Activity Status | Owner           | Priority | Start Date         | Due Date           | Date Created      |
|--|-----------------|---------------|-----------------|-----------------|----------|--------------------|--------------------|-------------------|
| ---  | Leslee Cignola  | Task          | Open            | James Griffin   | Normal   | ---                | ---                | 4/7/2022 12:00 AM |
| 1001 Sam Bass pricing                      | Den Peterson    | Task          | Open            | Robert McCall   | Normal   | 5/28/2021 12:00 AM | 5/28/2021 12:00 AM | 5/20/2022 3:00 AM |
| 17   | Andrew Polizzi  | Task          | Open            | Cindy Van Wart  | Normal   | 11/3/2022 8:00 AM  | 11/3/2022 8:00 AM  | 9/6/2022 9:15 AM  |
| 19   | Ernest Garcia   | Task          | Open            | Cindy Van Wart  | Normal   | 9/21/2022 8:00 AM  | 10/13/2022 8:00 AM | 8/15/2022 3:00 AM |
| 1st attempt                                | Jason Donaldson | Task          | Open            | Jody McCullough | Normal   | 5/26/2022 8:00 AM  | 5/26/2022 8:00 AM  | 5/25/2022 1:00 AM |
| 1st attempt not at this time               | BRANDON OLIVER  | Task          | Open            | Rosemarie Hemar | Normal   | 5/31/2023 8:00 AM  | 5/31/2023 8:00 AM  | 5/31/2022 4:00 AM |
| 1st attempt Roll off for the Jacque Maphet |                 | Task          | Open            | Rosemarie Hemar | Normal   | 5/11/2023 8:00 AM  | 5/11/2023 8:00 AM  | 5/4/2022 1:50 AM  |
| 1st attempt lvm and sent + Mankin Chigava  |                 | Task          | Open            |                 |          |                    |                    |                   |
| 1st X Date Request                         | Gary Nipp       | Task          | Open            |                 |          |                    |                    |                   |

Article: MDM Rush Hour

MDM Monitoring and Automation App



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# CHANGE MANAGEMENT

# 66

The average days required for a new behavior to become a habit (18-254 days).

- European Journal of Social Psychology

| Goals Set | Goals Attained |
|-----------|----------------|
| 2-3       | 2-3            |
| 4-10      | 1-2            |
| 11+       | 0              |

- Franklin Covey

Learn and adapt to  
your unique pace of change.



# Communication, Learning & Development Plan

| Area                                 | In Scope         | Notes   |
|--------------------------------------|------------------|---|
| # Training/Communication Plans       | 2                | Separate LOBs with different launch dates   |
| # Departmental Ride-Alongs           | 8                | Identify opportunities to improve architecture, automation, and usefulness to end-users   |
| Monthly Office Hours Sessions        | 4                | Drop in and ask questions – open meeting and chat for instant responses to questions.   |
| # Communication Documents/Mo         | 1-2              | Full documents such as emails, SharePoint news, PDFs or files for printed distribution.   |
| # Quick Tips / Mo                    | 1-2              | Brief how-to tips for posting, either based on user-sourced information, or regularly scheduled content for release   |
| # Communication Sends / Mo           | 2-6              | Emails, posts (such as to Teams, Viva Engage), articles, etc. Some videos and other items will result in multiple communication posts.  |
| Champions Community Portal           | Yes – C5 Sets Up | Identify champions to aid with training, user Q&A, tier 1 support, and feedback on improvements. Setup training/certification requirements. Setup collaboration portal.                 |
| Learning Hub                         | Yes – C5 Sets Up | This is different from an LMS – a “quick learning” portal to host many of the training assets provided by C5 or developed by the client   |
| Learning, Adoption & Support Portal  | Yes – C5 Sets Up | Includes links to Learning Hub, and a community support area for Champions and Users to ask questions, share stories, etc   |
| # Escalated Tickets / Yr             | 50               | Estimated total tickets: 140-315<br>Estimated escalations 14-90 – probably front-end weighted   |
| # Live Training Sessions             | 4                | Prepare, deliver, record, post and provide deck for 1.5-3.0 hour training sessions  |
| Portal/LMS Uploads                   | C5 Managed       | Some content may require upload to client LMS site (assuming there will be a more formalized and long-format training requirement). Other content will be uploaded to the Learning Hub. |
| # Digital Adoption Platform Licenses | 90               |   |
| DAP Initial Configuration            | C5 Managed       |   |
| # Training Assets / Mo               | 3-6              | Videos, tip sheets, help pages (web), DAP page updates, etc – likely a bit more heavily weighted towards front-end of services  |

# BEHAVIOR MINING

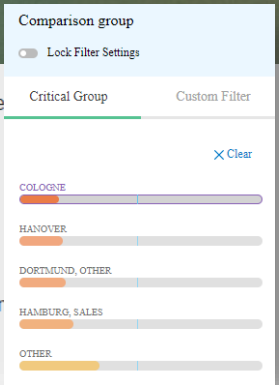
I take time to interact with my colleagues

I relate to my colleagues' emotions.

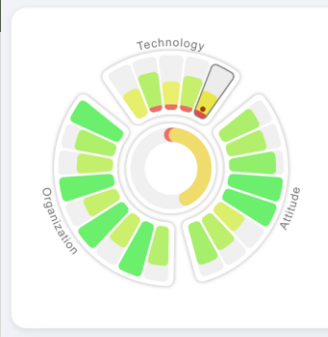
Where I work, employees withhold information from one another.

Where I work, employees withhold information from management.

Where I work, employees generally trust one another.



## Complete organization compared to Cologne



### Usage support

Describes how a group perceives the organizational and technical infrastructure that supports CRM.



Usage support for Cologne is catastrophically low.

Usage support for Cologne is catastrophically low.

2/2

### Recommendations

Review the types of support that are available to this group to gain a clear picture of what is available: is there documentation in their first language? Is there media, like training or explanation videos, cheat-sheets, or podcasts? Are there (or have there been) introduction sessions or basic training events? Is there a digital support system, where this team can ask questions or explain problems, and get an answer by an expert? Are experts available by phone or in person for live support? Once you have an overview of the available support, ask yourself: is it objectively sufficient, taking into account the specific needs of this group, and the specific challenges of using your implementation of CRM?

If the amount and type of support is sufficient, consider the quality of the support: is the support team sufficiently aware of the real life usage scenarios of the users for users to articulate their needs and obstacles? Is the response time of the support team sufficiently aware of the real life usage scenarios of the users for users to articulate their needs and obstacles?

Also pay attention to the resources needed to use CRM: is the hardware sufficient, and adequately set up? Is there support for hardware problems? Are the data connections and their bandwidth appropriate, in all usage scenarios? I.e., both in the office and in the field?

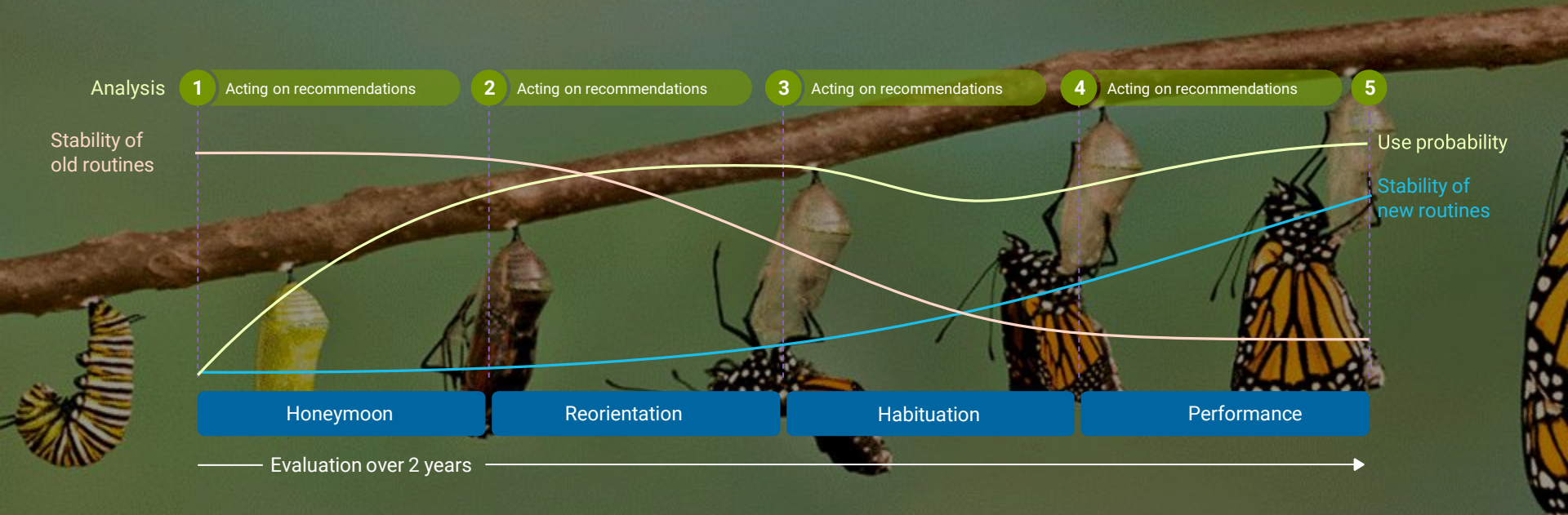
If both the quantity and quality of support and resources are objectively sufficient and adequate, revisit this group's expectations: are they expecting it to do something that it can't, no support can help them get there. To avoid a latent sense of disappointment, manage expectations. Deal with the disappointment calmly and openly. If their expectations are convincing, consider how you can help them, at least partially. After the initial disappointment, this score should begin normalizing, and adoption should be on the uptake.

Link: Rate Your Intranet e-Book

Link: Adair.app



# Technology Adoption Timeline



# Learning Portal

The screenshot shows a SharePoint Learning Portal homepage. At the top, there's a search bar and navigation links like 'Home', 'Why Microsoft 365?', 'M365 Use Cases', 'M365 Product Learning', 'FAQs', 'Our Governance Policies', 'Help', and 'Admin'. Below the navigation, there are several featured articles and sections:

- Microsoft 365 Overview & Application Definitions**: A large article featuring a tablet, a smartphone, and a coffee cup.
- Learning Topics by Product**: A section with colorful icons representing different Microsoft products.
- Microsoft Teams Learning Topics**: A section with a laptop and a smartphone displaying Teams-related content.
- HELP**: A section with a hand icon and the text 'Quick help: OneDrive, Teams, or SharePoint?'.
- Why Microsoft 365?**: A section with a photo of two people talking.

At the bottom, there's a welcome message: 'Welcome to the Microsoft 365 Learning Portal!' and a feedback link: 'Feedback? See something missing? Let us know!'.

This screenshot shows a 'Quick help: I need to...' section with a grid of blue buttons for various tasks:

- Store my personal work files & share with colleagues
- Store & collaborate on shared files with a specific group
- Place Audio & Video Calls with Colleagues
- Chat & occasionally share files with colleagues
- Share files with all of Tandem
- Create a survey, feedback form, or quiz and analyze results
- Automate a business process, send activity alerts or execute an approval
- Track support request tickets
- Manage projects - track, organize, and categorize tasks
- Test or learn Microsoft 365 features

To the right, there's a 'Microsoft 365 News & Updates' section with several articles:

- Managing Files in Teams**: A Microsoft Team "sits on top of" a SharePoint site. Files...
- Best Practices for Teams Channels**: A Microsoft Team is a workspace that includes all of the...
- Teams Posts - Channel-based Chat**: Have you ever wondered what the Posts tab in Teams...
- Microsoft Teams: Meeting Options**: This article walks through various options you may not be...

A place for "quick learning", pages, documents, very short videos.

Video Tour: Custom Learning Portal



- 6 -

A glass bottle with a cork and a rolled-up document floating in water. The bottle is tilted, and the document is visible inside. The water is blue and has ripples around the bottle.

**DOCUMENTS &  
INTERNAL  
COLLABORATION**

# DOCUMENTS

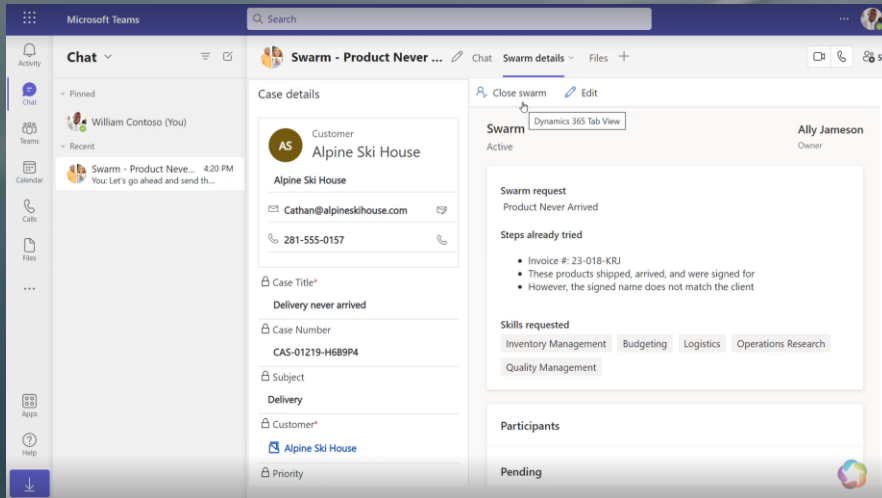
Goal: Everyone inside and outside of CRM can easily find any document.

- Quotes
- Orders
- Contracts and Agreements
- Templates



# COLLABORATION

Goal: It is easy for CRM users to work with non-CRM users, with both accessing all of the information they need.

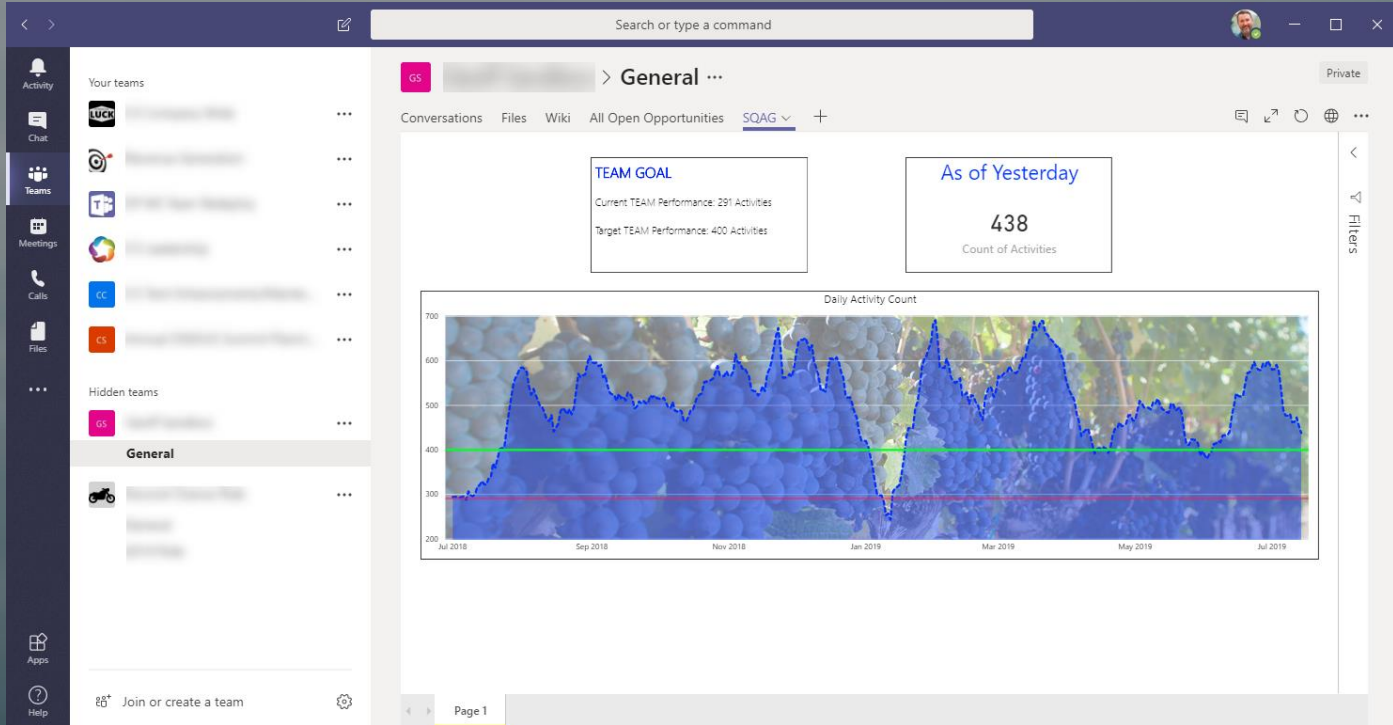


The screenshot displays the Microsoft Teams interface. On the left is the navigation pane with icons for Activity, Chat, Pinned, Teams, Recent, Calendar, Calls, Files, and Help. The main chat window shows a conversation with 'Swarm - Product Never Arrived' (4:20 PM). A 'Swarm' card is visible, titled 'Swarm' and owned by 'Ally Jameson'. The card content includes:

- Swarm request:** Product Never Arrived
- Steps already tried:**
  - Invoice #: 23-018-KRJ
  - These products shipped, arrived, and were signed for
  - However, the signed name does not match the client
- Skills requested:** Inventory Management, Budgeting, Logistics, Operations Research, Quality Management
- Participants:** Pending

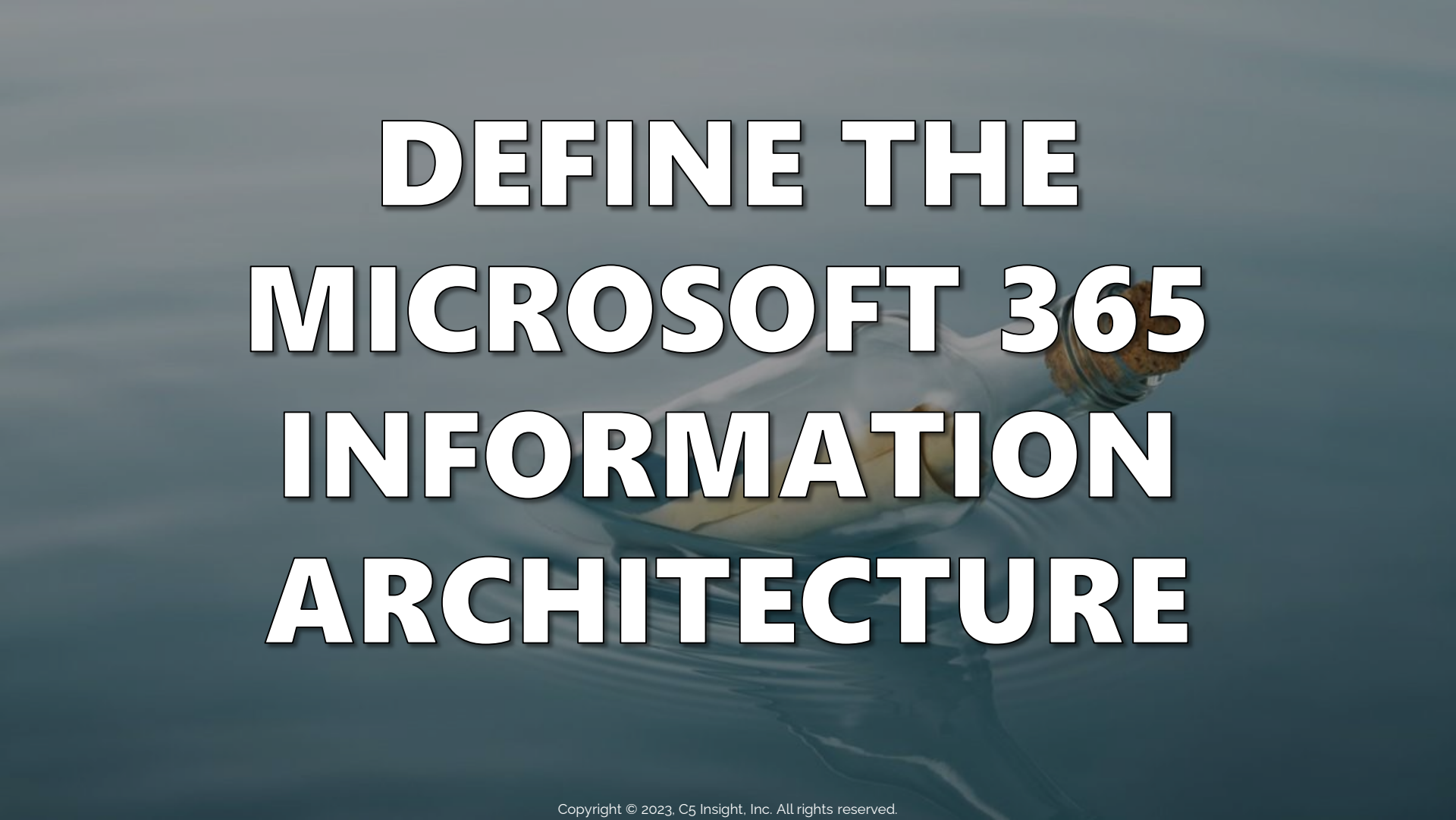
Video: Embedded Teams Chat

Video: Customer Service Swarming



KNOW  
YOUR **SQAG**



A background image showing a hand holding a pen over a document, with a glass of coffee nearby. The text is overlaid on this image.

# **DEFINE THE MICROSOFT 365 INFORMATION ARCHITECTURE**

A close-up photograph of a person's hands, wearing a dark blue long-sleeved shirt, cupping a mound of dark brown soil. A small, vibrant green seedling with several leaves is growing out of the center of the soil. The background is softly blurred, showing a grey surface and a tray of similar soil.

- 7 -

# CARE AND FEEDING





A close-up photograph of a pile of horseshoes scattered on a green lawn. The horseshoes are in various colors: dark brown, light yellow, and white. Some are rusty, while others appear newer. The text "CLOSING THOUGHTS" is overlaid in large, white, bold, sans-serif font with a black outline across the center of the image.


# CLOSING THOUGHTS



# 7 HABITS

- **These are Habits:**  
Think “Process” not “Project”
- **Dive Deeper:**  
Download the Resources
- **Digital Coach:**  
Partner with C5 Insight

1. Initial and Annual Planning



2. Process Design



3. Integration



4. Master Data Management



5. Change Management



6. Collaboration and Document Management



7. Care and Feeding



A close-up photograph of a pile of horseshoes scattered on a green lawn. The horseshoes are in various shades of brown, tan, and grey, and are arranged in a tangled, overlapping manner. The background is a soft-focus green lawn.

“

**Profit** is the **pulse** of the organization,  
**people** are the **heart**.

— Powered by LUCK



# Q&A and RESOURCES



C5insight

Dynamics 365 | Power Platform | Microsoft 365  
Consulting | Implementation

**Geoff Ables**

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www.c5insight.com

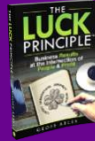
704.281.8067



## Today's Links

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