Dynamics 365 Implementation Best Practices Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Dynamics 365 Implementation Best Practices Training Course provides a comprehensive and structured approach for organizations aiming to successfully implement Microsoft Dynamics 365. As businesses strive for digital transformation, adopting the right methodology for deploying CRM and ERP solutions is crucial. This course covers critical aspects, from strategic planning and system design to deployment, ensuring organizations can maximize the value of their Dynamics 365 investment. By learning industry-leading best practices and leveraging the power of cloud technology, participants will gain the skills needed to execute successful Dynamics 365 implementations, manage complex integrations, and optimize user adoption.

Through this training, attendees will explore hands-on use cases and real-world case studies, gaining an understanding of key factors such as project scoping, change management, data migration, and post-implementation support. In today's competitive environment, organizations are expected to deliver high-performance solutions with minimal disruption. This course offers practical knowledge that will empower your team to reduce risks, improve project delivery, and unlock the full potential of Dynamics 365.

Programme Curriculum

Dynamics 365 Implementation Best Practices Training Course

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Course Duration

5 days

Course Objectives

By the end of this training, participants will be able to:

1. Implement Dynamics 365 CRM and ERP solutions effectively for various business scenarios.
2. Apply best practices for project planning and scoping in Dynamics 365 implementations.
3. Understand change management strategies critical to successful deployments.
4. Develop a robust data migration strategy and integrate legacy systems with Dynamics 365.
5. Ensure seamless user adoption through effective training and communication strategies.
6. Address security concerns and compliance requirements in Dynamics 365 environments.
7. Identify and manage risks throughout the Dynamics 365 implementation lifecycle.
8. Use agile methodologies for efficient and scalable project delivery.
9. Design and optimize Dynamics 365 solutions based on industry-specific requirements.
10. Leverage Power Platform for enhanced automation and reporting capabilities.
11. Integrate third-party applications into Dynamics 365 for improved functionality.
12. Apply continuous improvement strategies post-deployment for system optimization.
13. Develop an understanding of user-centric design to increase engagement and productivity.

Target Audience

1. Project Managers overseeing Dynamics 365 implementations.
2. Business Analysts working on solution design and optimization.
3. IT Professionals responsible for system integrations and customizations.
4. Functional Consultants looking to improve their deployment strategies.
5. Change Management Specialists guiding organizations through transitions.
6. Senior Executives interested in digital transformation and business solutions.
7. Data Migration Experts involved in legacy system integrations.
8. Sales and Marketing Teams leveraging CRM capabilities for customer management.

Course Modules

Module 1: Introduction to Dynamics 365 Implementation

- Overview of Dynamics 365
- Key benefits for businesses
- System architecture and deployment models
- Case study: Setting up an effective implementation team
- Stakeholder management strategies

Module 2: Project Planning and Scoping

- Defining project objectives and goals
- Estimating resources and timelines
- Identifying business requirements and use cases
- Creating a project roadmap and deliverables
- Case study: Managing expectations and scope creep

Module 3: Data Migration and System Integration

- Key data migration challenges
- Planning and executing data mapping
- Handling third-party system integrations
- Ensuring data quality and integrity
- Case study: Data migration in a retail industry implementation

Module 4: Change Management and User Adoption

- Strategies for smooth organizational change
- Training end-users and stakeholders
- Creating a user adoption plan
- Addressing resistance to change
- Case study: Successful user adoption in a global organization

Module 5: Dynamics 365 Customization and Configuration

- Overview of customization capabilities in Dynamics 365
- Configuring entities, forms, and dashboards
- Developing workflows and business rules
- Extending functionality with Power Platform
- Case study: Customization for a manufacturing client

Module 6: Security and Compliance

- Security roles and access control in Dynamics 365
- Managing compliance with GDPR and other regulations
- Auditing and monitoring user activities
- Protecting sensitive business data
- Case study: Implementing security in a financial services company

Module 7: Post-Implementation Support and Optimization

- Monitoring system performance post-deployment
- Implementing continuous improvement strategies
- Handling user feedback and issues
- Upgrading Dynamics 365 systems
- Case study: Post-implementation support in a healthcare organization

Module 8: Advanced Topics and Best Practices

- Optimizing for mobile users and remote teams
- Leveraging artificial intelligence in Dynamics 365

- Integrating Power BI for advanced reporting and analytics
- Best practices for system updates and patches
- Case study: Advanced Dynamics 365 use in an e-commerce business

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com