

Software Assurance Planning Services



Get the most out of your IT investment with Planning Services for Microsoft Dynamics CRM, structured consulting engagements to help you launch and grow your CRM solution on-premises or online.

Plan Your Microsoft Dynamics CRM Implementation, Upgrade or Migration

Planning Services for Microsoft Dynamics CRM provides the expert guidance to put your investments to work. Whether you're using Microsoft Dynamics CRM for the first time, expanding your current solution, upgrading to the latest version or migrating to the cloud, Planning Services provides expert guidance from Microsoft partners or Microsoft Services. Streamline your deployment and create a custom implementation, upgrade or migration plan based on your unique requirements and process needs to help improve marketing effectiveness, boost sales, and enrich customer service interactions.

Migrating to Microsoft Dynamics CRM Online

- ▶ Review your business requirements and envision the cloud solution
- ▶ Assess the fit of an online solution and migration considerations
- ▶ Test drive a recommended path to migration with a Microsoft Dynamics CRM Online Proof of Concept

Upgrading Microsoft Dynamics CRM

- ▶ Get up to speed on what the latest Microsoft Dynamics CRM version can do for your business
- ▶ Assess your current implementation and the complexity of upgrading
- ▶ Test drive your solution with a pilot, in a Microsoft Dynamics CRM Online trial environment

Implementing Microsoft Dynamics CRM

- ▶ Review your processes and assess business needs
- ▶ Create and scope a custom solution architecture
- ▶ Test drive your solution with a pilot in Microsoft Dynamics CRM Online trial environment

Learn what Microsoft Dynamics Planning Services can do for you.

Access the Latest Innovations in CRM

Arm your people with a CRM solution that combines the power of productivity with ease of use. Implement or migrate Microsoft Dynamics CRM on-premises or online to access a reimagined user experience, increased productivity, CRM on the go, social conversations in a business context, real-time actionable insights, and enterprise-scale services.

Put Your IT Investment to Work

Choose Planning Services for Microsoft Dynamics CRM to optimize your investment in Dynamics, start realizing the benefits today and plan the implementation, migration or upgrade of a better solution that fits your changing requirements.

Streamline your CRM Implementation

Receive expert guidance from a Microsoft partner or Microsoft Services for an efficient implementation, migration or upgrade of your custom CRM solution, which meet your specific business requirements and market changes

Choose the Right Engagement for Your Business

As a Software Assurance customer, you may be entitled to Planning Service days which can be used for deployment planning engagements with Microsoft Services or qualified Microsoft partners. The number of Planning Services days you are eligible for depends on the type and number of qualified Software Assurance licenses you have. Find out how many Planning Services days your company has by visiting the [Volume Licensing Service Center](#). If your organization has a Microsoft Products and Services Agreement (MPSA), go to the [Microsoft Volume Licensing Center](#).

	3 Days	5 Days	10 Days	15 Days
Upgrading Microsoft Dynamics CRM	Explore the latest innovations in CRM and what they can do for your business with Microsoft Dynamics CRM Workshop. Review business scenarios, define a vision and create an action plan.	Assess your current implementation and the complexity of the technical and functional upgrade.	Test the vision your own processes, data and users with a proof of concept showcasing either enhanced mobile experience or enterprise social enablement.	Test the vision your own processes, data and users with a proof of concept showcasing either enhanced mobile experience and enterprise social enablement, or business intelligence.
Implementing Microsoft Dynamics CRM	Assess your business processes and CRM requirements, explore how Microsoft Dynamics CRM can help, and receive a high-level scope to build out your custom solution.	In addition to the activities in the 3-day engagement, receive a high-level solution architecture design and solution scoping assessment.	In addition to the activities in the 3-day and 5-day engagements, test the benefits of your custom solution with an online proof of concept.	In addition to the activities in the 3, 5 and 10-day engagements, extend the proof of concept to design, showcase how the solutions will integrate with the customer environment.
Migrating to Microsoft Dynamics CRM Online	NA (no 3-day engagement is offered)	Assess your business and CRM requirements, explore the best migration path to update and migrate your solution to current version, the degree of fit of Dynamics CRM Online to your requirements and assess what it will take to migrate your data to the cloud.	In addition to the activities in the 5-day engagements, understand better how a custom online solution will meet your business requirements with a conference room Proof of Concept, which will offer a demo environment with one business process relevant to your business with demo data (no migration).	In addition to the activities in the 5-day engagements, test the benefits of a cloud solution with a Proof of Concept, migrating one of your processes, including limited data on your Dynamics CRM Online domain, as a suggested migration template, showcasing what it will take to migrate your solution to cloud.

Activate Your Software Assurance Benefits Today

- ▶ Get started with Planning Services for Microsoft Dynamics today, visit the [Microsoft Volume Licensing Service Center](#). If your organization has a Microsoft Products and Services Agreement (MPSA) go to the [Microsoft Volume Licensing Center](#) to get started. Note: Administrative rights are required to activate Planning Services. Contact your Software Assurance benefits administrator for assistance.
- ▶ See the [VLSC Software Assurance Guide](#) for detailed, step-by-step instructions for accessing and using Planning Services, or view the [Managing Software Assurance](#) video for a visual demonstration.
- ▶ To locate a qualified partner, visit the [Planning Services Partner Directory](#) or check with your Microsoft representative.

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