TruNorth Dynamics

Net New Client Sales Flow

01 Partner Lead

- Referral from Partner
- Partner/Client lead is created
- Meeting invites sent to Partner and Client

02 Client Discovery

- Understanding client need and confirm if D365 is a fit

03 Demo

- System overview by the Solution Architect (SA) - Includes pre-demo questionnaire (if applicable)

04 Blueprint

- Client wants to move forward
- Quote provided
- Opportunity won/invoice generated
- Project created
- ISV demos scheduled

05 Solution Overview

- Solution Overview document delivered
- Solution Overview document reviewed
- Client Agrees to final Solution Overview

06 Statement of Work

- Create project opportunity with 3rd party products
- Statement of Work/Quote sent to the client
- Statement of Work approved

07 Project

- Project kick-off meeting scheduled by PM
- Implementation PM and Project Team
- Go live

08 Project Handoff

- Hand off to Client Success team/Support Team

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TruNorth's support **does not end here!**

Our mission is to provide our clients with innovative, industry-leading business solutions that allow them to focus on their core competencies and grow their businesses.

Our vision is to be the most trusted and reliable partner in the Microsoft Dynamics community, providing quality solutions and services that exceed customer expectations.

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