

## Software Assurance Microsoft Planning Services for Dynamics 365



Get more from your IT investment with Planning Services for Microsoft Dynamics 365, structured consulting activities to help you launch and grow your CRM solution.

*Important:* Software Assurance Deployment Planning Services are being retired. Starting February 2021, planning days will no longer be accrued for any agreement. You can use your planning services days for engagements until February 1, 2022. See [Microsoft Planning Services](#) for more information.

### Plan your Microsoft Dynamics 365 upgrade or migration

Planning Services for Microsoft Dynamics provides expert guidance from Microsoft partners or Microsoft Services about how to put your investments to work. Streamline your deployment based on your unique requirements and process needs, by creating custom plans for upgrade or migration plans of your current CRM solution. The result will help improve marketing effectiveness, boost sales, and enrich customer service interactions.

#### Upgrading Microsoft Dynamics 365 for Customer Engagement

- Assess the latest CRM capabilities of Dynamics 365 for Customer Engagement and what they can do for your organization
- Evaluate your existing implementation and the complexity to upgrade

#### Migrating to Microsoft Dynamics 365 for Customer Engagement

- Review your organizational requirements and envision an implementation in the cloud with Dynamics 365 for Customer Engagement
- Assess cloud migration considerations and fit for your unique requirements
- Test drive a recommended path to migration with a Dynamics 365 for Customer Engagement POC

#### Upgrading Microsoft Dynamics 365 for Finance and Operations

- Review your business processes to understand what it will take to implement a solution that meets your needs and requirements
- Determine the best way to migrate your code and metadata
- Identify the most suitable implementation path, create a custom plan, and deliver a proof-of-concept

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## Choose the right engagement for your organization

As a Software Assurance customer, you may be entitled to Planning Services 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. Planning Services days are pooled and can be used on any of the Planning Services offerings regardless of the products purchased. Find out how many Planning Services days your organization has by visiting the [Volume Licensing Service Center](#). If your organization has a Microsoft Products and Services Agreement (MPSA) go to the [Microsoft Business Center](#).

## Learn what Microsoft Dynamics Planning Services can do for you

### Access the latest innovations in CRM

Reimagine your CRM solution by assessing how Microsoft Dynamics 365 for Customer Engagement works seamlessly across sales, customer service, field service, and marketing. Microsoft Dynamics 365 for Customer Engagement can grow with your organization. It gives you flexibility and choices with apps that solve real problems and deliver real value with best-in-breed CRM capabilities that will help you delight your customers.

### Put your IT investment to work

Choose Planning Services for Microsoft Dynamics 365 for Customer Engagement to optimize your investment in Microsoft Dynamics. Start to plan your migration or upgrade, and test how the proposed solution can transform the way you engage with customers and empower employees with new products and services.

### Streamline your CRM implementation

Receive expert guidance from Microsoft partners or Microsoft Services to efficiently migrate or upgrade your custom CRM solution that fits and meets your specific organization requirements and market changes.

## Activate your Software Assurance benefits today

- Get started with Planning Services for Microsoft Dynamics today by visiting the [Microsoft Volume Licensing Service Center](#). If your organization has an MPSA, go to the [Microsoft Business Center](#). Note: Administrative rights are required to activate Planning Services. Contact your Software Assurance benefits administrator for assistance.
- To locate a qualified partner, [search partner listings](#) or check with your Microsoft representative.
- See the [VLSC Software Assurance Guide](#) for detailed, step-by-step instructions for accessing and using Planning Services. MPSA customers go to the [Microsoft Business Center](#).
- Visit [Software Assurance](#) to learn more about [Planning Services](#) and other Software Assurance benefits.