



## Project Title

### Microsoft Dynamics 365 CRM Implementation

**Client:** Vizion Crane & Industrial Support LLC

**Role:** CRM Implementation Lead | Sean's Consulting Service

**Timeline:** May 2024 – July 2024

**Budget:** \$100,000

## Project Snapshot

Led a full-scale CRM transformation to replace legacy systems with Microsoft Dynamics 365. Directed all project phases, from requirements gathering to training and post-go-live support, resulting in higher operational efficiency and improved client satisfaction.

---

 [www.trivawatlinton.com](http://www.trivawatlinton.com)

 [linkedin.com/in/triva-watlinton](https://linkedin.com/in/triva-watlinton)

## My Role

- Project Manager & CRM Implementation Lead
- Conducted stakeholder discovery sessions
- Created project roadmap, timeline, and risk plan
- Oversaw Microsoft Dynamics 365 installation and configuration
- Migrated data from legacy systems with 100% validation
- Designed and customized workflows, forms, and permissions
- Led user acceptance testing (UAT) and end-user training





## Key Challenges

- Ensuring zero downtime during CRM switchover
- Managing data migration from outdated platforms
- Customizing Dynamics 365 to reflect operational workflows
- Aligning goals across IT, operations, and third-party vendors

## Solutions Delivered

- Requirements specification and data migration strategy
- Fully installed, configured, and integrated CRM system
- Customized modules to match business workflows
- Trained 5 users and delivered custom documentation
- Provided post-implementation support and troubleshooting

## Results

-  Delivered 2 weeks ahead of schedule
-  Came in under the \$50K project budget
-  **25% increase** in client satisfaction
-  **40% reduction** in manual CRM reporting time

## Skills & Tools

Microsoft Dynamics 365 · Project Management · Data Migration  
Workflow Automation · UAT · End-User Training · Documentation