

pronix.ai

An AI-first business of Pronix Inc.

IMPLEMENTATION PLAYBOOK · PNX-GDE-120

Microsoft Dynamics 365 Implementation

A pronix.ai implementation playbook covering microsoft dynamics 365 implementation. Scope, approach, reference architecture, roles, delivery cadence, guardrails and unit economics — written for enterprise leaders funding real programs, not evaluating slideware.

PREPARED FOR

CIO, Chief AI Officer, VP Contact Center, COO

PREPARED BY

pronix.ai Strategy Practice, Enterprise AI & CX advisory

EDITION

Updated Q1 2026 · Implementation Playbook

STRATEGY · IMPLEMENTATION · TALENT pronix.ai/resources

EXECUTIVE SUMMARY

Microsoft Dynamics 365 Implementation

A pronix.ai implementation playbook covering microsoft dynamics 365 implementation. Scope, approach, reference architecture, roles, delivery cadence, guardrails and unit economics — written for enterprise leaders funding real programs, not evaluating slideware.

90 days

To first production increment

2-week

Delivery cadence

Fixed-fee

For defined scopes

What you'll take away

- Scope discipline that makes the first increment ship in weeks, not quarters
- The reference architecture and platform choices for this workload
- The role card and RACI that keep delivery on cadence
- Guardrails, evaluation and audit patterns your risk officer will sign off on
- Unit economics and how to instrument them from day one

Audience: CIO, Chief AI Officer, VP Contact Center, COO

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SECTION 01

Discovery & outcome scoping

Two-week discovery: current state, target operating state, unit economics baseline, integration inventory, and the single first-production outcome we will ship in the increment. Deliverable is a signed scope and a delivery calendar.

In our engagements, the practical work in this section usually breaks down into three deliverables: scope discipline that makes the first increment ship in weeks, not quarters; the reference architecture and platform choices for this workload.

The finance conversation is won or lost on unit economics. Instrument cost-per-resolution, cost-per-decision or cost-per-contained-contact from day one, publish the run-rate weekly, and make trade-offs — model tier, context length, cache strategy — visible to product owners rather than buried in a platform bill.

SECTION 02

Reference architecture

A layered target-state architecture with named products at each layer — telephony, routing, agent desktop, agent assist, conversational AI, analytics, data plane and identity — and an explicit set of anti-patterns to avoid on this platform.

In our engagements, the practical work in this section usually breaks down into three deliverables: the reference architecture and platform choices for this workload.

Treat this as a reference, not a recipe. The layer boundaries matter more than the specific products you pick — a clean seam between orchestration, tools, memory and evaluation is what lets you swap providers as pricing, model quality and regulatory posture shift over the next 18 months.

WHAT GOOD LOOKS LIKE

The reference architecture and platform choices for this workload

SECTION 03

Delivery cadence

Two-week increments, each shipping a production capability to a real queue or intent. Every increment closes with an evaluation pass on production traffic and a documented rollback path.

In our engagements, the practical work in this section usually breaks down into three deliverables: the role card and raci that keep delivery on cadence.

Delivery cadence beats delivery ceremony. A two-week increment that ships a real capability to a real queue — even for a single skill or intent — creates the feedback loop that keeps the program honest and builds the internal muscle you'll need long after the systems integrator leaves.

SECTION 04

Integration seams

CRM, ticketing, workforce management, quality management, IAM, telephony carrier and data warehouse. Each seam is contract-tested against a synthetic and a production trace before go-live.

In our engagements, the practical work in this section usually breaks down into three deliverables: scope discipline that makes the first increment ship in weeks, not quarters; the reference architecture and platform choices for this workload.

Enterprise outcomes here come from production discipline, not slideware. Named owners, shipped guardrails, evaluation harnesses in CI and instrumented unit economics turn a promising pilot into a portfolio the board is willing to fund again next year.

WHAT GOOD LOOKS LIKE

Guardrails, evaluation and audit patterns your risk officer will sign off on

SECTION 05

Guardrails & governance

Enforcement points at the intent boundary, the tool layer and the output layer. Named human owner and review SLA for every high-risk decision. Audit trail retained per regulatory obligation.

In our engagements, the practical work in this section usually breaks down into three deliverables: guardrails, evaluation and audit patterns your risk officer will sign off on.

Governance that ships is architectural, not a policy PDF. Every enforcement point should be a callable service with test coverage, and every high-risk decision should have a named human owner, a documented review SLA, and an audit trail that a regulator or internal auditor can pull without a ticket.

SECTION 06

Go-live & hypercare

Cutover behind a dual-run window with parity checks against the incumbent stack. Hypercare team on-call for four weeks post-cutover, with a documented weekly report to the sponsoring executive.

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WHAT GOOD LOOKS LIKE

Scope discipline that makes the first increment ship in weeks, not quarters

SECTION 07

Enablement & handover

Runbooks, on-call rotations, evaluation harness in CI, and a certification path for the internal admin, engineering and QA teams. The goal is that pronix.ai leaves and the program keeps shipping.

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FREQUENTLY ASKED

Questions from enterprise buyers

What outcomes should we expect in the first 90 days?

A single production increment on a real queue, an instrumented unit-economics dashboard, and a documented delivery cadence your internal team can carry forward.

Do we need to be on a specific platform to engage pronix.ai?

No. We are certified across Amazon Connect, Genesys Cloud, NICE CXone, Five9, Kore.ai, Salesforce Agentforce, Microsoft Dynamics 365 and Google CCAI, and we deploy on AWS Bedrock, Azure AI Foundry, Google Vertex AI, OpenAI Enterprise and Anthropic Claude.

How is pricing structured?

Fixed-fee for defined scopes (pilots, migrations, implementations) and blended monthly for managed run. Talent solutions are per-role, per-month with defined replacement guarantees.

TURN THIS INTO A DECISION

Book a 30-minute working session.

Bring your platform, data, seats and delivery constraints. A pronix.ai strategy or CX engineering lead will walk this document through with your team and adapt it — no slideware, no generic playbook.

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