

TAILORED ROADMAP

A fully customized plan designed around your system's complexities.



Timeline:
6-8 Weeks

Format:
Strategic consulting, architecture mapping, and executive presentation

Best For:
Complex, custom, and integrated systems

TAILORED ROADMAP OVERVIEW

The Tailored Roadmap is built around customization and strategy, helping you transform complexity into clarity through a fully customized planning experience. The purpose of this engagement is to architect a comprehensive, enterprise-level roadmap that aligns technology, process, and vision to your organization's unique goals.

WHAT'S INCLUDED

- **Collaborative Design Sessions:** Up to four 2-hour design sessions covering multiple products or functional areas.
- **Solution Design:** High-level documentation showing how your core processes will work within D365.
- **Cross-Product Solution Mapping:** Comprehensive design of how each D365 application (and integrated tools) will work together.
- **Integration Overview:** Identification of data flow, automation points, and potential third-party connections.
- **Refined Project Estimate:** Updated estimate based on the solution design and clarified scope.
- **Guided Recommendations:** Expert insights, next steps, and roadmap-to-project conversion guidance.
- **Executive Summary:** Project scope, cost, and implementation approach, as well as the next steps in the sales process.

RETURN ON INVESTMENT

Organizations that complete a TruNorth Roadmap experience:

- Fewer scope changes and work requests
- Faster budget approval
- Reduced project costs
- Stronger executive alignment

At TruNorth, we view roadmaps as essential, not optional. Taking time to define your path is what transforms an implementation into true, organizational success.

HOW THE PROCESS WORKS

Phase	Description
Executive Alignment & Scoping	Begin with Leadership-level discussions to establish vision, desired outcomes, and strategic priorities.
Collaborative Discovery & Design	TruNorth consultants and architects work alongside your business and IT stakeholders in iterative workshops - documenting requirements, mapping integrations, and defining custom functionality.
Solution Architecture & Business Modeling	TruNorth develops your detailed design documentation, technical diagrams, and cost models - connecting every recommendation to business value and ROI.
Review, Validation, & Next Steps	Review the complete roadmap with leadership to ensure shared understanding, readiness, and confidence to move forward.
Deliverable	Solution Overview document includes: <ul style="list-style-type: none">• Complete solution design for every system in scope• Detailed integration and customization documentation• Financial model with cost, timeline, and resource projections• Implementation roadmap aligned with executive priorities• Strategic recommendations for change management and adoption