



# Dynamics 365 Community Call (CRM Edition)

## From Client Side to Professional Services: Lessons Learned, and Lessons for Partners to Learn

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Presented by | Sharon Smith  
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# TODAY'S AGENDA

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1. Who am I?
2. Life as a Solution Architect on the Client Side
3. Transitioning over to Professional Services
4. Lessons Learned
5. Lessons for Partners to Learn
6. Is this Move Right for You?

# Speaker Bio: Sharon Smith

- Dynamics 365 Solution Architect
- Microsoft Dual BizApps MVP for Customer Experience and Customer Service
- 8+ Years Experience with Dynamics 365 CRM & ERP Apps
- Working both Global and National projects
- Lead Architect for ANS Group's Microsoft FastTrack Portfolio Partner program
- Microsoft Women In Power(Platform) Mentor and Power Up Program Champ



*“There’s no such thing as Normal”*

*#ANS Squirrel Club Power*



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# Life as a Solution Architect on the Client Side

- Being a direct member of staff gives you a different mindset.
- Yes, more empathy with the end-end user, because you are one of them.
- You know everyone, and everyone knows you. This changes how you run workshops.
- More likely to be delivering larger, multi-year, waterfall-approach projects.
- Less direct pressure on you personally to deliver.
- It's all about the Team's success. No I(vory tower architects) in successful Teams.





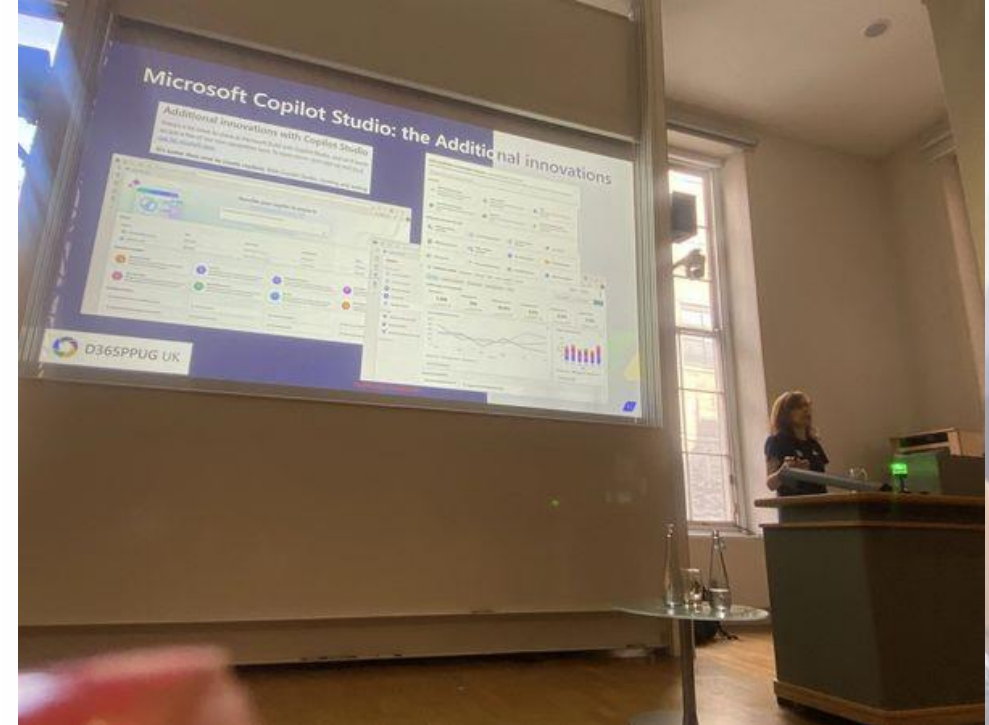
# Transitioning to a Solution Architect in Professional Services

- From being a nerdy specialist to having to become an expert leader.
- The only place for being humble is when accepting your MVP award.
- Your presentation skills and ability to control and lead a meeting are key.
- You need to be able to quickly learn new skills and new or different viewpoints.
- Utilisation is everything: you are a resource, to be moved around projects as needed.
- Learn resilience and grow a thick skin. You'll need it every day.



# Lessons Learned

- Your elevator pitch is everything. There is no room for Imposter Syndrome.
- If the Client doesn't want you on a project, take it personally.
- Learn to become comfortable regularly watching and listening to yourself.
- Ask for feedback from your peers and PMs at every opportunity.
- Proactively ask for advice if you're not sure how to approach something
- You have to be able to do your job when at work; if you're compromised, say so.



# Lessons for Partners to Learn

- Provide targeted support for those transitioning from the Client side.
- Include PS & Partner-specific delivery standards in onboarding training.
- Peer review new starters' initial delivery sessions, whatever their level of seniority.
- Learn how to support neurodiverse and differently-abled staff to excel and deliver.
- Normalise continuous feedback from PMs and peers, not just during annual reviews.
- Teach all line managers how to provide context-sensitive, constructive feedback.





# Is Professional Services Right for You?

Yes:

- If you like / need variety in your work.
- If you can handle being expected to be constantly “strong and smashing it”.
- If you accept that you’re going to make missteps in your first year but learn from them.

No:

- If you prefer consistency and stability.
- If you don’t have a growth mindset, and deep reserves of resilience.
- If your life-work/community balance can’t flex when needed.





# THANK YOU!

## ANY QUESTIONS?



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