1. A Skills and Resources Audit. The idea is that, before you dive into the project, the team should undertake an audit of what skills and tools the team needs to successfully carry out the project, and therefore what you need to learn/acquire (and from where).

Skills and tools required:

* SharePoint
* MS Access
* Database Migration from MS Access to CRM
* Database Integration on SharePoint
* CRMs
  + On Premise, Cloud based (On Demand)
    - Dynamics 365
    - Salesforce
    - HubSpot
  + Dataverse
* Database schema knowledge
* Security of databases
  + Passwords
  + User Permissions
  + 2-Factor Authentication CRM feature
  + Reliable CRMs
* SQL/ SQL Server

Where to learn

CRMs

Dynamics 365 - Integrate with SharePoint

<https://learn.microsoft.com/en-us/dynamics365/sales/connect-with-sharepoint?tabs=SE>

Set up Dynamics Integration with SharePoint Step-by-Step

<https://www.youtube.com/watch?v=ABpHzvcEc-A>

Migrate Access Database to Microsoft CRM

<https://www.empowerit.com.au/blog/10-reasons-to-migrate-your-access-database-to-microsoft-crm/>

Microsoft Dataverse

<https://learn.microsoft.com/en-us/power-apps/maker/data-platform/data-platform-intro#dynamics-365-and-dataverse>

Migrate MS Access to SharePoint

<https://theitservice.co.uk/migrating-from-access-to-sharepoint/>

Migrate Access to Dataverse

<https://learn.microsoft.com/en-us/power-apps/maker/data-platform/migrate-access-to-dataverse>

Dataverse SharePoint Integration

<https://learn.microsoft.com/en-us/power-pages/configure/manage-sharepoint-documents>

Why migrate to Dataverse

<https://www.infinitygroup.co.uk/blog/benefits-of-migrating-access-databases-to-dataverse-for-microsoft-teams/>