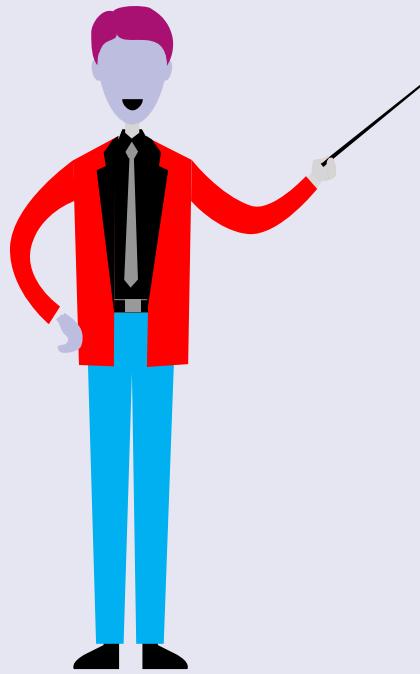


Pre-Sales & Customer Engagement for Dynamics 365



GOLOKNATH MISHRA



- What is Digital Transformation ?
- Why Digital Transformation?
- Microsoft Digital Feedback Loop
- Why Dynamics 365 ?
- RFx Concepts
- Common Terminologies
- Which app to select ?
- Microsoft Dynamics Sure Steps
- Project Deliverables
- Demo using Dynamics 365 Accelerators
- QnA

About Me

Goloknath Mishra

- Platform Specialist, DirectAsia Insurance, Singapore
- #GMDynamics365, MCT, Blogger, Youtuber, Technology Evangelist
- Dynamics 365, Azure Enthusiast and Power Addict having more than 10 years of experience in Dynamics 365, Power Platform & related Microsoft Technologies.
- Singapore Power Platform UG Lead
- Odisha Power Platform UG Lead
- D365 Champs Community Lead

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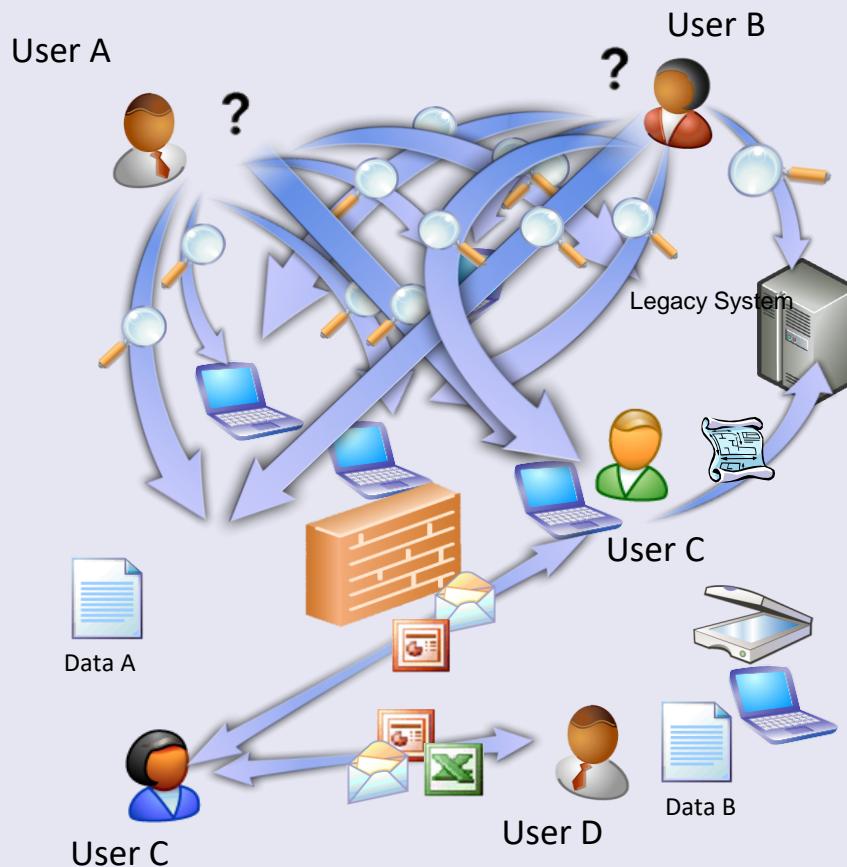
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Twitter-> <https://twitter.com/goloknathm>

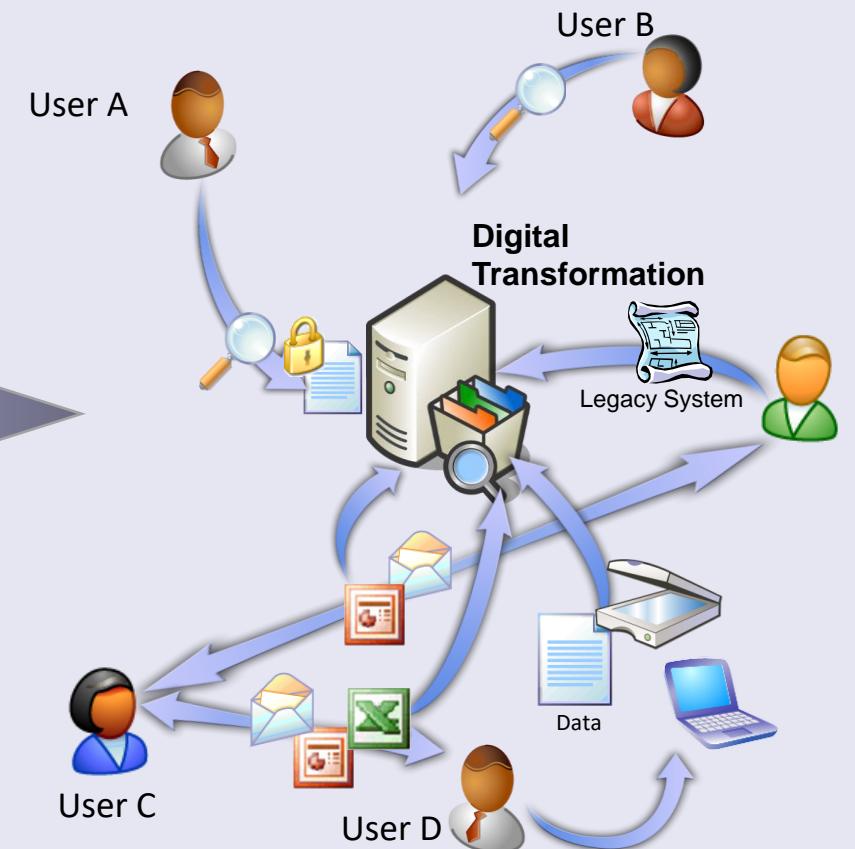
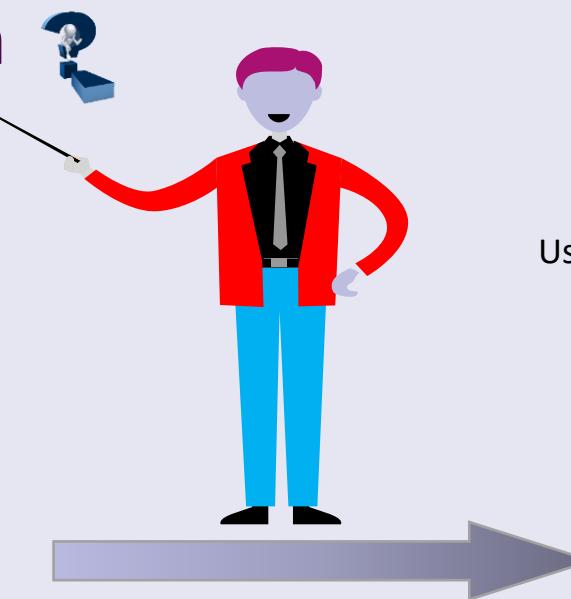
LinkedIn-> <https://www.linkedin.com/in/goloknath-mishra-7133ba104/>



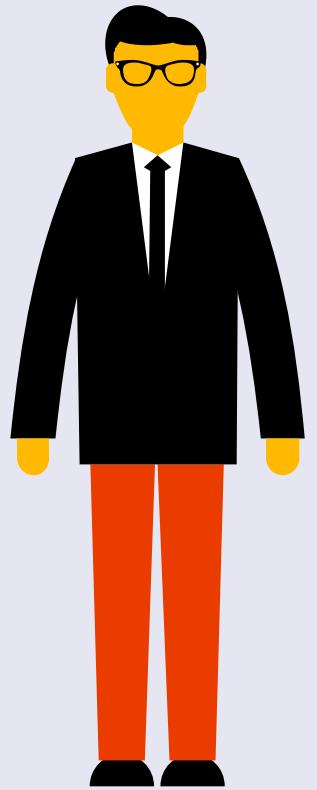
What is Digital Transformation



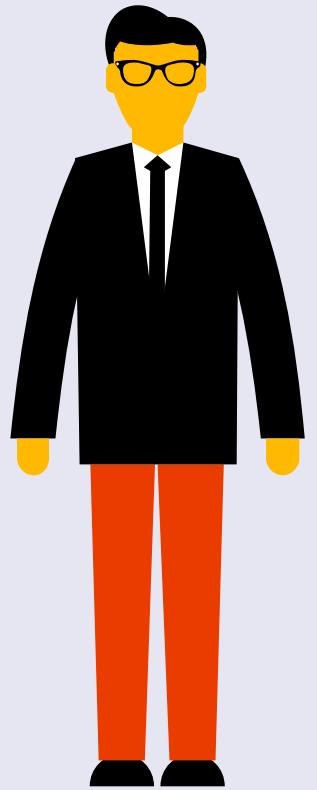
Before Digital Transformation



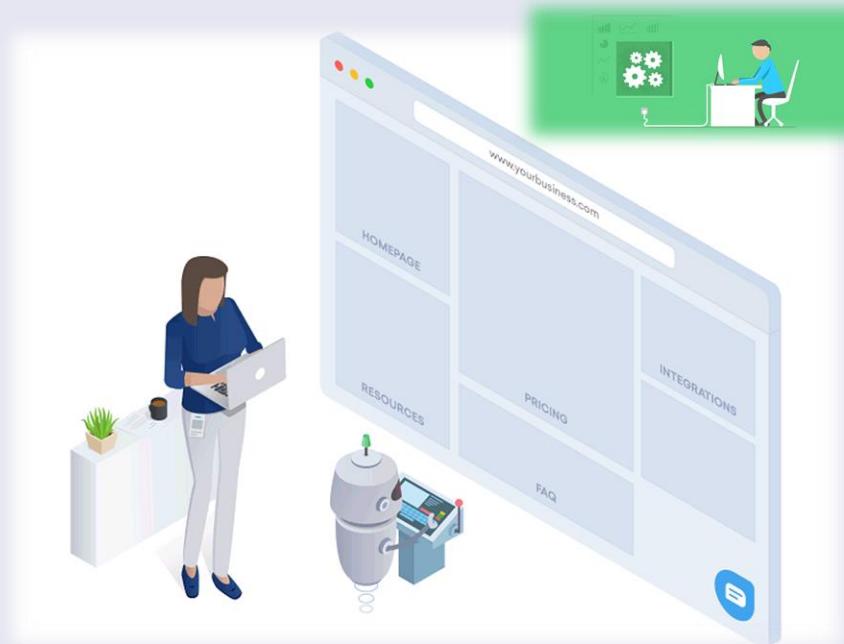
After Digital Transformation



Customer looking for
Digital Transformation

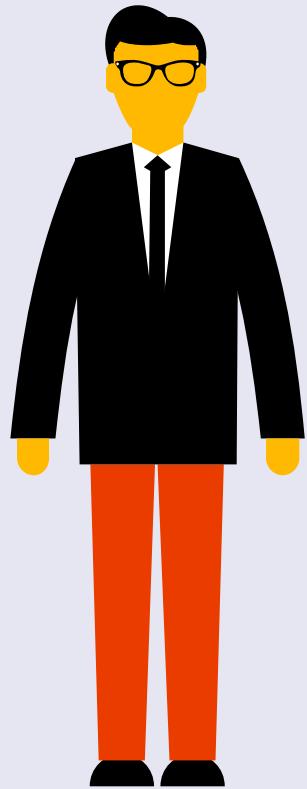


Customer looking for
Digital Transformation

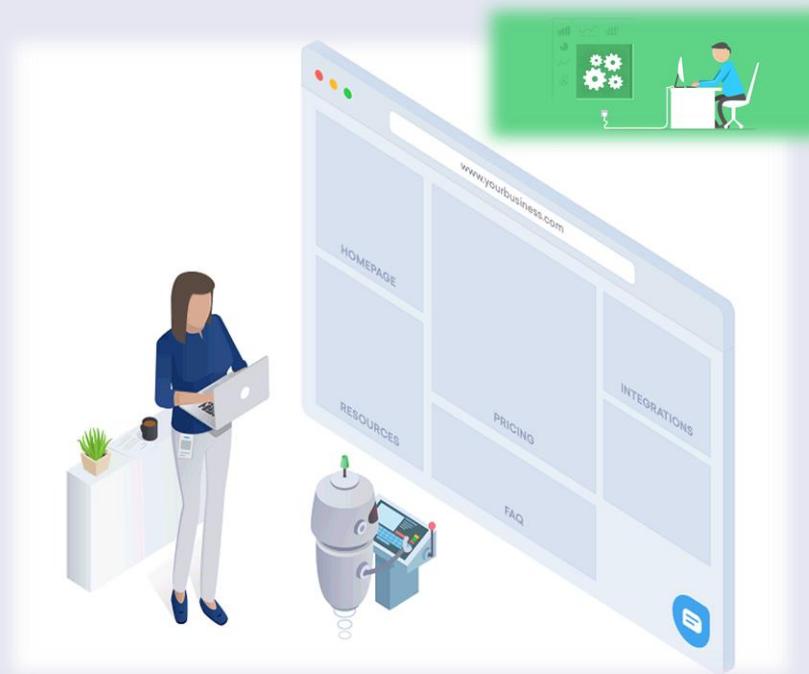


Expectation

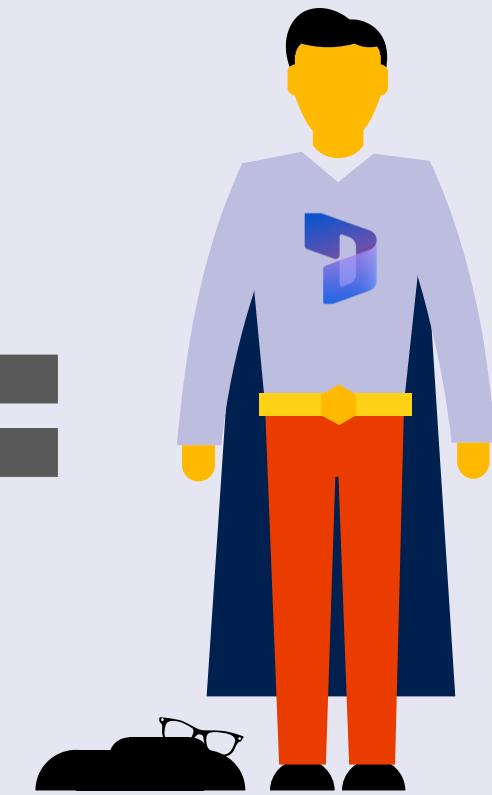




Customer looking for
Digital Transformation

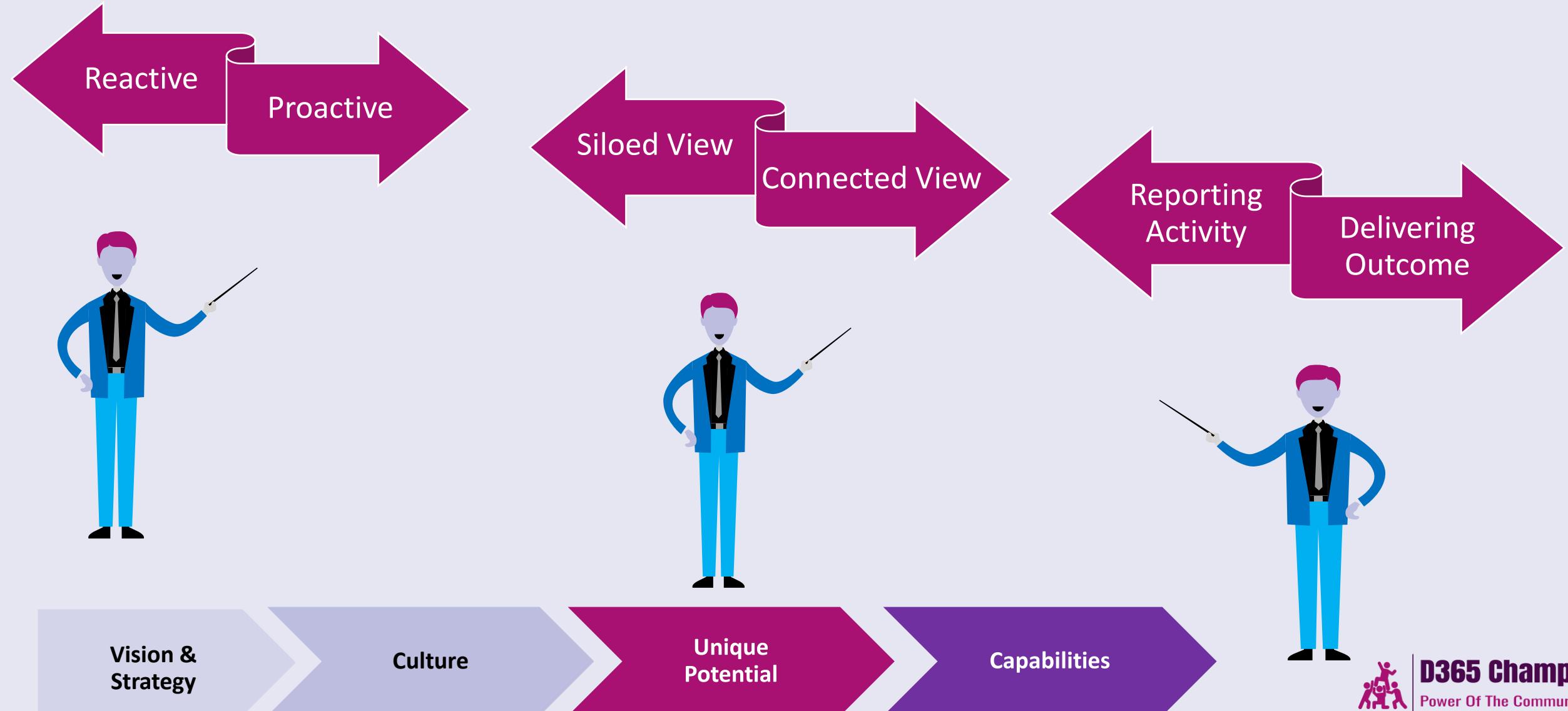


Expectation 

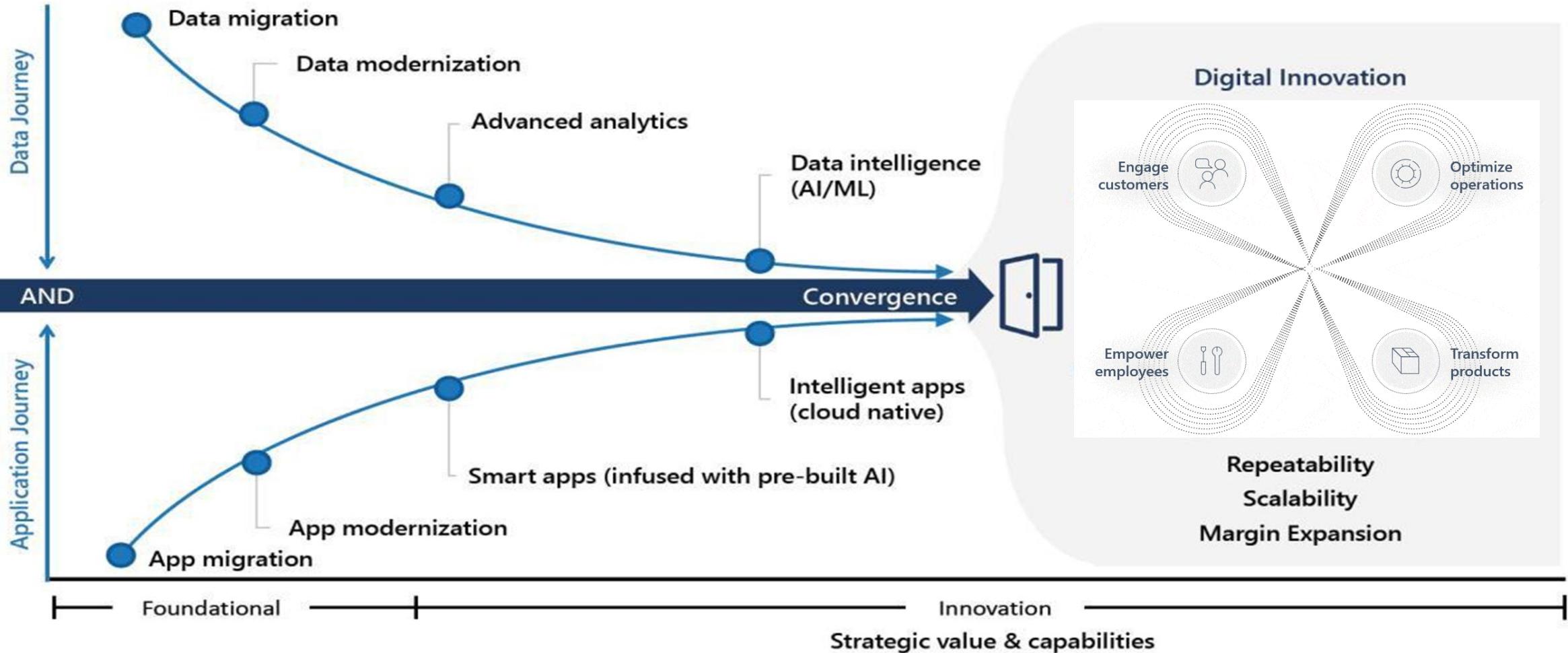


Answer to Expectation

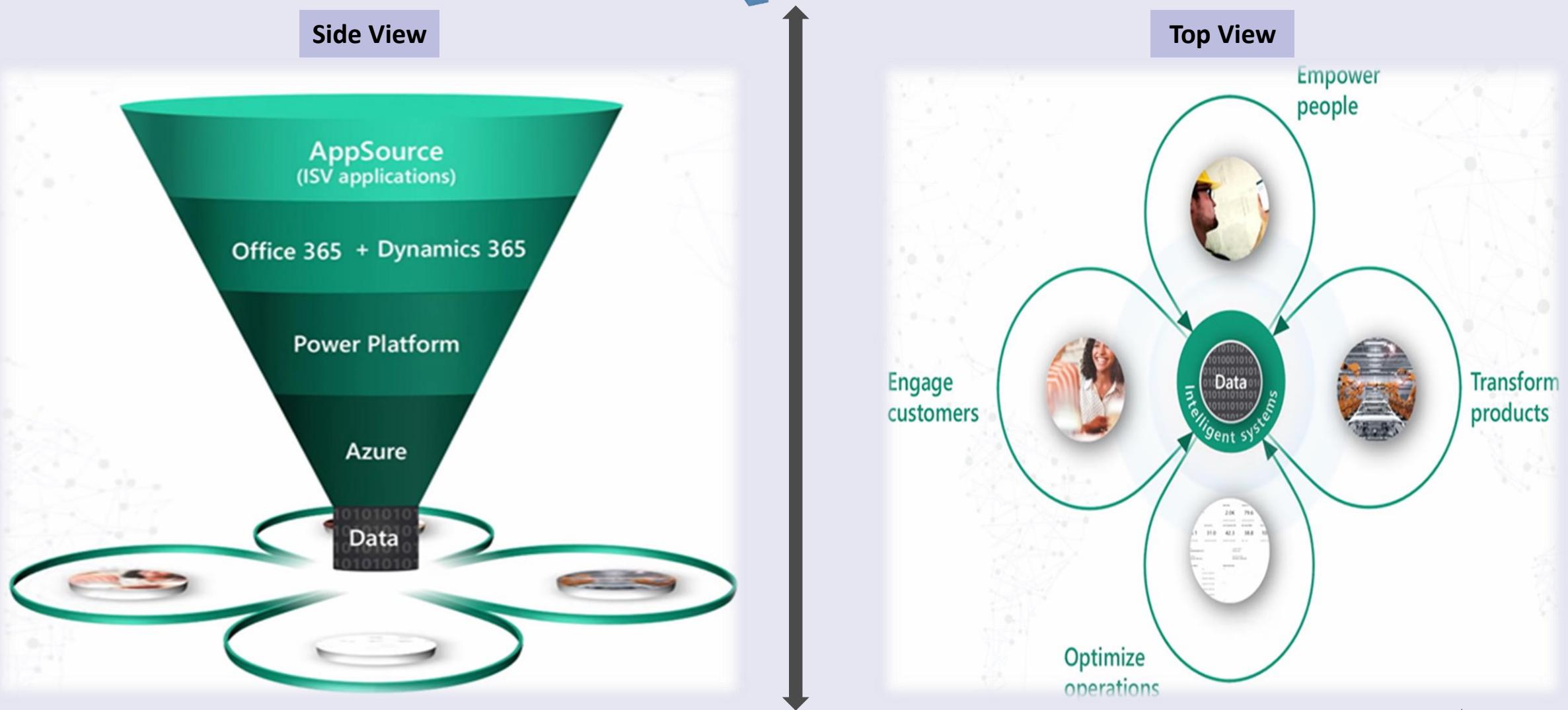
Why Digital Transformation & factors affecting DT



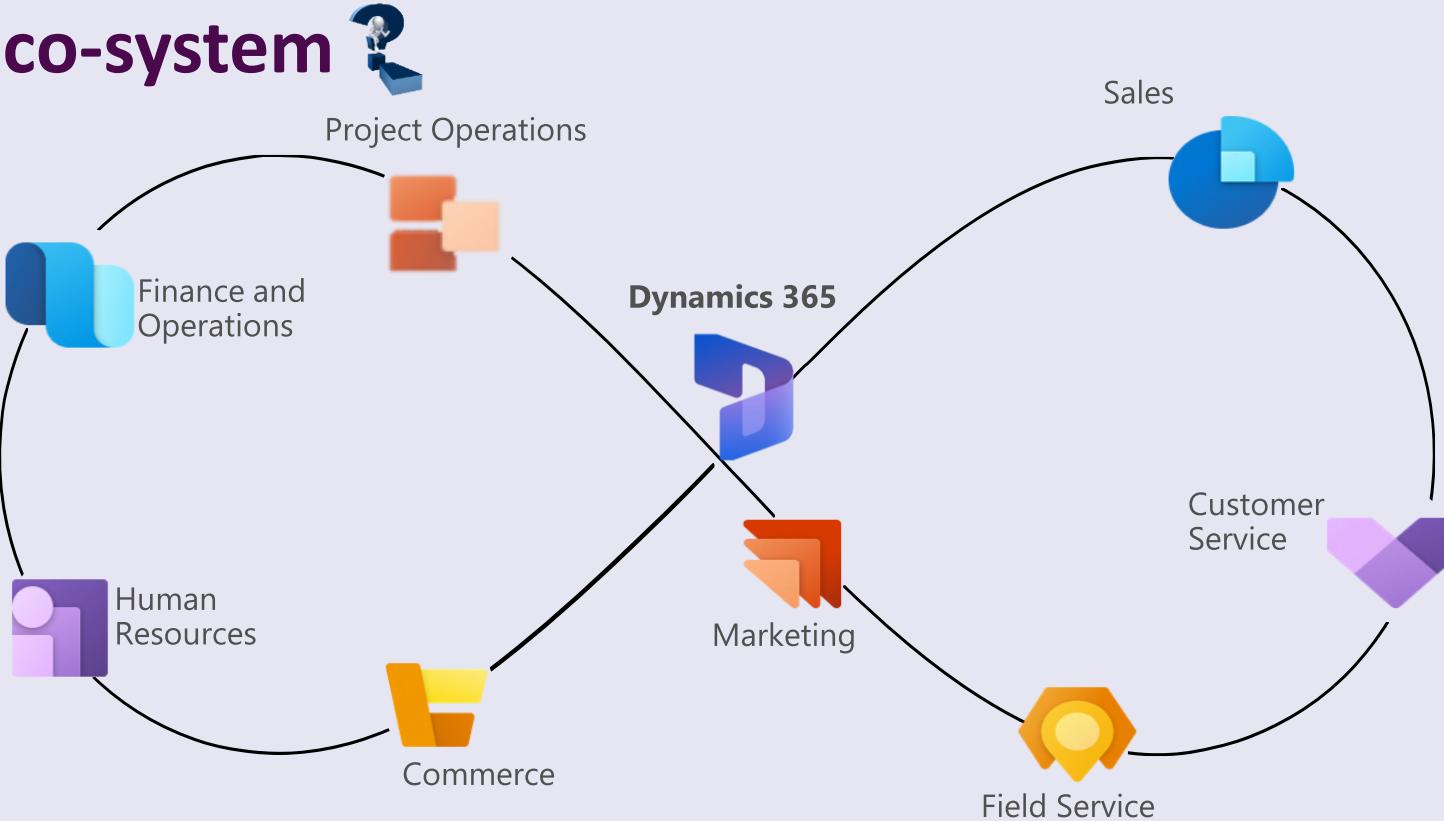
Microsoft Data & Application Journey



Microsoft Digital Feedback Loop



Dynamics 365 Eco-system

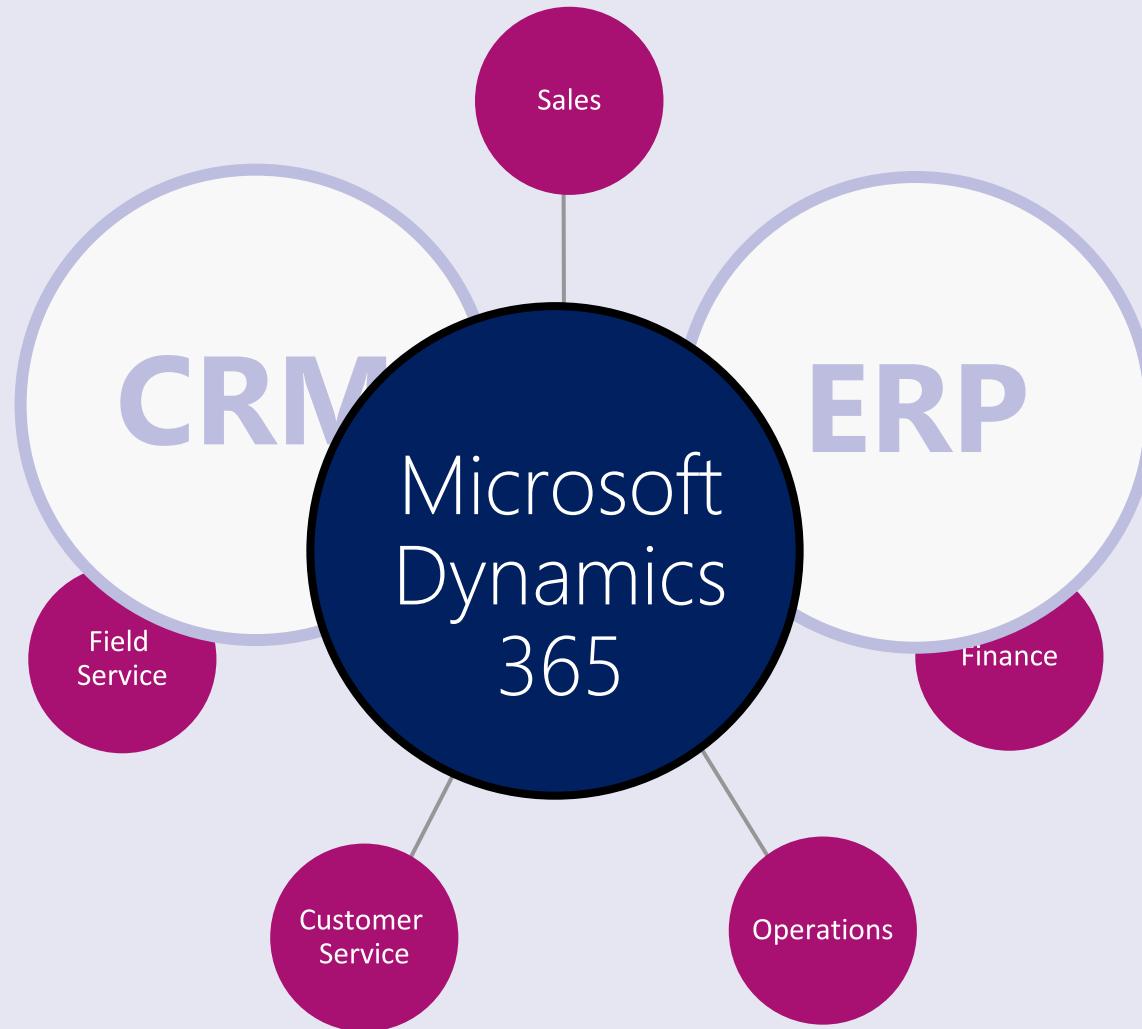


Office 365 | Azure IOT | Power BI | Cortana Intelligence

Application Platform (PowerApps, Power BI Embedded, Power Automate) and Dataverse

AppSource

Dynamics 365 is the fusion of CRM & ERP



D365 Landscape at a Glance



Intelligent Sales & Marketing



Proactive Customer Service



Connected Field Service



Modern Finance & Operations



Connected Commerce



Transactional

Dynamics 365 Sales

Dynamics 365 Customer Service

Dynamics 365 Field Service

Dynamics 365 Finance

Dynamics 365 Commerce

Dynamics 365 Marketing

Dynamics 365 Field Service

Dynamics 365 Marketing

Dynamics 365 Supply Chain Management

Dynamics 365 Marketing

Dynamics 365 Marketing

Dynamics 365 Customer Service

Dynamics 365 Business Central

Dynamics 365 Human Resources

Dynamics 365 Customer Insights

Dynamics 365 Customer Insights

Dynamics 365 Customer Insights

Dynamics 365 Fraud Protection

Dynamics 365 Fraud Protection

Dynamics 365 Sales Insights

Dynamics 365 Customer Service Insights

Dynamics 365 Customer Insights

Dynamics 365 Fraud Protection

Dynamics 365 Customer Insights

Analytical

Dynamics 365 Guides

Dynamics 365 Remote Assist

Dynamics 365 Guides

Observational

Power Apps

Power Automate

Power Virtual Agents

AI Builder

Portals



Power Platform

Power BI



Power BI

Power Apps

Power Automate

Power Virtual Agents

AI Builder

Portals



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Microsoft Business Applications are



Modern—Drive business results with next-generation, omni-channel applications that infuse artificial intelligence (AI), mixed reality, social, and mobile capabilities for rapid innovation.



Intelligent—Achieve greater business outcomes with built-in intelligence and prescriptive guidance delivered by leading AI and analytics technologies.

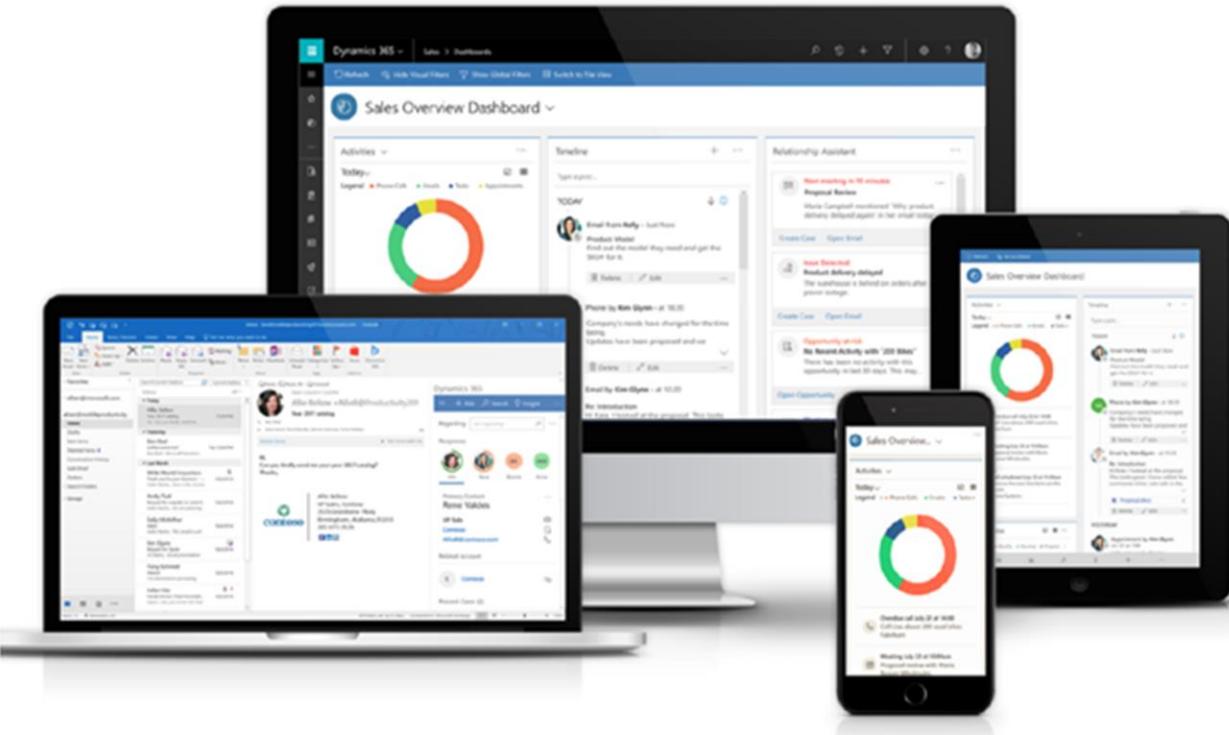


Unified—Enable people to do their best work by unifying relationships, processes, and data with comprehensive business applications connected through a common Microsoft cloud platform.



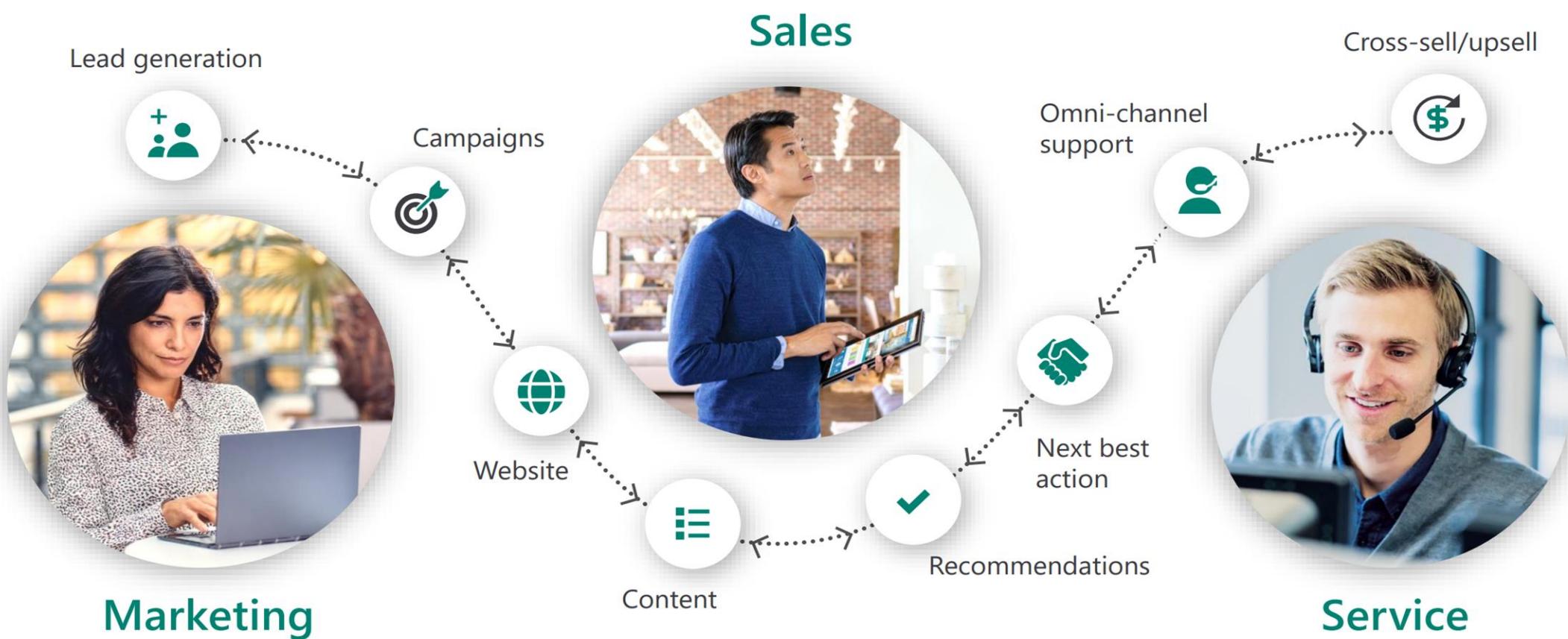
Adaptable—Thrive as your business changes by extending existing applications, building new solutions, and integrating with other technologies on a flexible, scalable, and secure platform.

Dynamics 365 – Unified Client



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CRM core process



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Typical Business Process flow of CRM



Marketing

Sales

Service

Field Service

Project Service

Generate Leads for The Organisation by Physical or digital marketing

Nurture the Lead and Convert to Customer

After Sales Customer Service Team will Provide service or Support to the customer

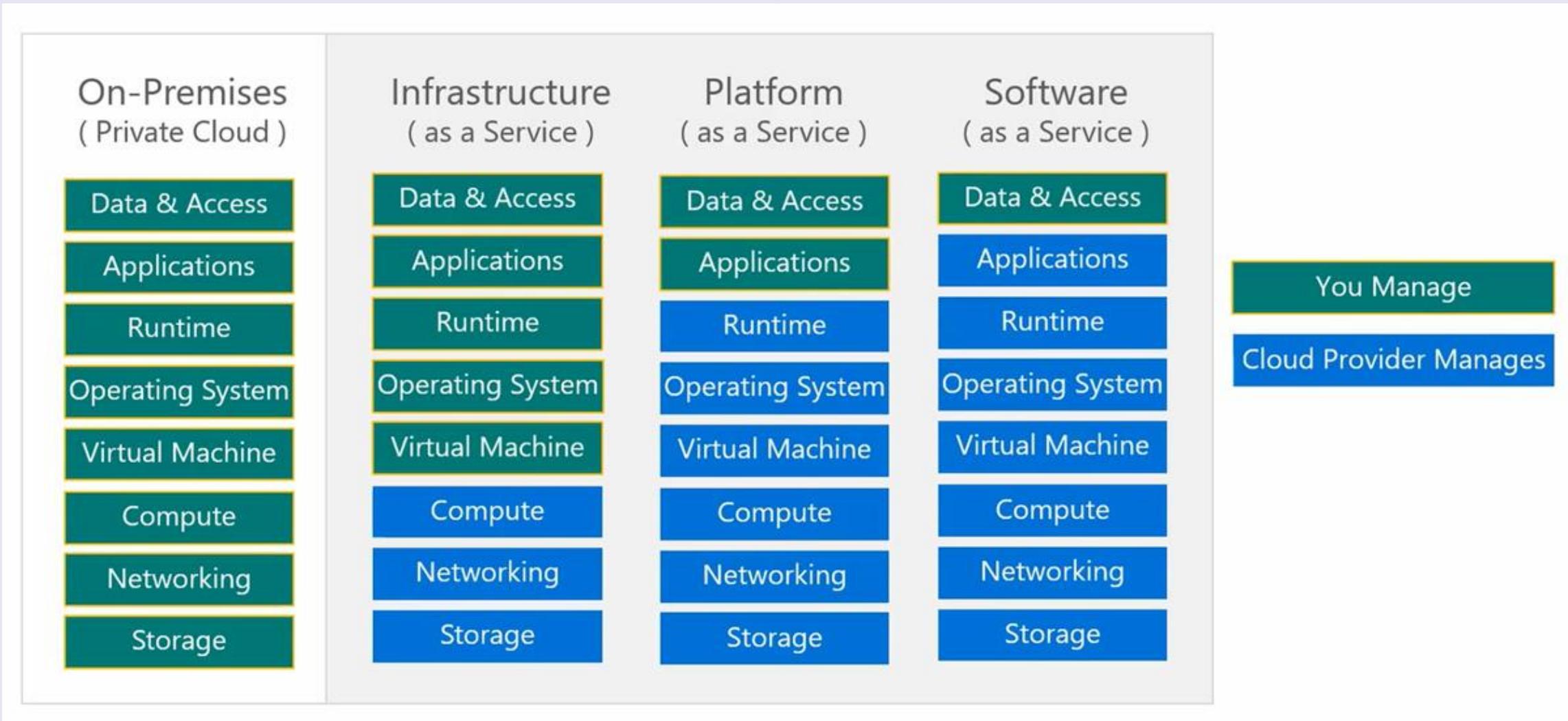
This depends on type of Service provided by the Organisation. Services Provided at Customer Location.

This also depends on organisation if they are providing Project Service or if they want to capture different Phases of project life cycle.

CRM Core Processes

CRM Additional Processes

Cloud Shared responsibility model

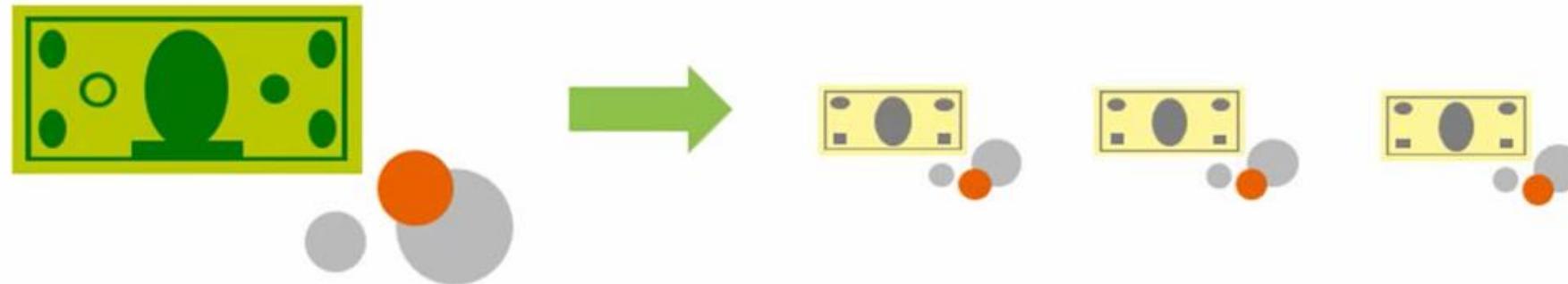


Capital Expenditure (CapEx)

- The up-front spending of money on physical infrastructure.
- Costs from CapEx have a value that reduces over time.

Operational Expenditure (OpEx)

- The spending and billing of services or products as needed.
- Expenses are deducted in the same year.



What is RFx



RFI

Request
for information



Educes



RFQ

Request
for quotation



Quantifies



RFP

Request
for proposal



Compares



The difference between the RFI, RFQ and RFP is what information they provide →

- An RFI educates → RFI responses explore how a vendor might solve a problem or fill a need
- An RFQ quantifies → RFQ responses provide the cost of meeting a specific need
- An RFP compares → RFP responses evaluate the merits of each vendor compared to others

Request for information (RFI)

Purpose: When you're looking for information or you're not sure what solution might solve your problem

Asks: General questions designed to educate and inform

Style: Casual, asking for help

Advantage: They're fast and help inform next steps to meet business needs

Request for quotation (RFQ)

Purpose: When you know exactly what you want and why, but need to explore all of the financial details

Asks: Questions about what it will cost to meet the requirements

Style: Structured and prescriptive

Advantage: Removes distractions and allows buyers to focus on price

Request for proposal (RFP)

Purpose: When you're ready to shop around and evaluate many factors before making a choice

Asks: Specific, detailed questions about the service, product and vendor's business

Style: Formal and direct

Advantage: Provides a clear comparison of vendor offers and capabilities

- **Acceptance criteria** — Factors used to determine whether a product or service meets the required standard, frequently used in software procurement. Also referred to as minimum qualifications or minimum requirements.
- **Agreement** — A legally binding contract, signed and executed by both the buyer and seller. Generally, the parties negotiate the agreement during the RFP process. Then, after execution of the contract, the buyer announces the RFP winner.
- **Best and final offer (BAFO)** — A request for the vendor to make a revised pricing proposal with their best possible price. Generally, this request is made when the buyer wishes to encourage competitive pricing and accelerate negotiations.
- **Business requirements document (BRD)** — A BRD is a formal document that outlines the goals and expectations an organization hopes to achieve by partnering with a vendor to complete a specific project.
- **Change management** — When a company prepares for, plans and manages through a departmental or organizational change. Change management offers a foundation for reducing risk and improving communication while ensuring a successful transition to a new system or process.
- **Closing date** — The due date when all proposal submissions must be completed and returned to the issuer or buyer. Also known as a submission due date.
- **Competitive bidding** — Used in government, this is a public bid that solicits companies to submit their best proposal to compete for a specific project. Often legally required, competitive bidding is intended to create an open, fair and transparent procurement process.
- **Debarment** — When a person or business is no longer allowed to receive RFPs. Most often issued by government entities after an offense or failure to meet performance expectations, the debarment may be temporary or permanent.
- **Due diligence** — An assessment of the risks involved in the supply chain and procurement process. It often takes into account company stability, policies and employee training and is evaluated using a due diligence questionnaire.
- **Executive summary** — A short summary of the key proposal components that is written for senior-level decision makers in the issuer's organization. Also known as a management summary.
- **Letter of intent(LOI) to bid** — A formal letter to a buyer, written by a vendor to indicate their plan to prepare a proposal or decline to bid in response to an RFP.

- **Pricing tables** — A tool that allows buyers to collect, analyse and present vendor pricing data in one clear format to determine which vendor best suits the organization or client's needs.
- **Proposal** — An offer, submitted in response to a request from an organization, that provides a solution to a problem, requirement or objective as outlined in the RFP. Also called an RFP response or bid.
- **RACI matrix** — A grid used for proposal project management. Indeed, the grid details chronological steps in the proposal process as well as which team members are **responsible(R)**, **accountable(A)**, **consulted(C)** and **informed(I)**.
- **Response** — The offer received from a vendor in response to an issued RFP. Commonly referred to as offers, bids, quotes or proposals.
- **RFA** — Request for application, an announcement that grant funding is available. An RFA informs researchers and organizations that they may present grant proposals.
- **RFP cover letter** — A one-page document introducing your proposal to the buyer.
- **RFP evaluation criteria** — A list of business needs and expectations that a buyer uses to score proposals from prospective vendors. Ideally, the RFP evaluation criteria are provided to vendors as well as proposal evaluators to ensure fairness and consistency in scoring.
- **RFx** — Collective term that all references to request for information (RFI), request for proposal (RFP), request for quote (RFQ), request for bid (RFB) and more.
- **ROI** — Return on investment is a way to evaluate the effectiveness of an investment. ROI tries to quantify the return on a particular investment, relative to the investment's cost.
- **Security questionnaire** — Part of the procurement process to evaluate risk with questions about security controls, business continuity and security policies.
- **Spend analysis** — Spend analysis is the practice of collecting, classifying and analysing data to decrease procurement costs, improve efficiency and monitor compliance.
- **Vendor evaluation** — A part of vendor management. The periodic process of evaluating and approving new and old suppliers based on how well they meet the business's needs. To properly evaluate a vendor, you must establish KPIs and determine the vendor's value and quality.

- **FRD** – A functional requirements document (FRD) is a formal document that outlines how an organization expects their vendor to help them achieve a strategic business goal.
- **LD** – Liquidated damage(LD) if vendor not able to deliver the project as agreed business may charge LD as specified in the tender document.\
- **SOW** – The Statement of Work should indicate all items that will be delivered, the timeline or timelines involved and when invoicing will take place. The SOW declares what expectations and underlying assumptions are associated with the project. Your organization will be legally obligated to deliver what you agreed to in the SOW's terms when it comes time to formalize the contract.
- **MSA** – A Master Services Agreement (MSA) serves to define how your company and the other company will work together. One key element of this document will be the terms of payment. SOW will be child documents to the MSA.

Decision factors affecting for a tender submission →

- Conditions of Participation, Accreditations & Quality standard? (e.g. Financial Capability, Relevant licenses, ISO, CMMI, ISI etc.)
- What is the evaluation criteria?
- Pricing Schedules ?
- What is the scope of work?
- What is your implementation process like?
- What kind of training do you offer?
- Can you provide references, reviews or case studies from past project experience?
- Who are your competitors?

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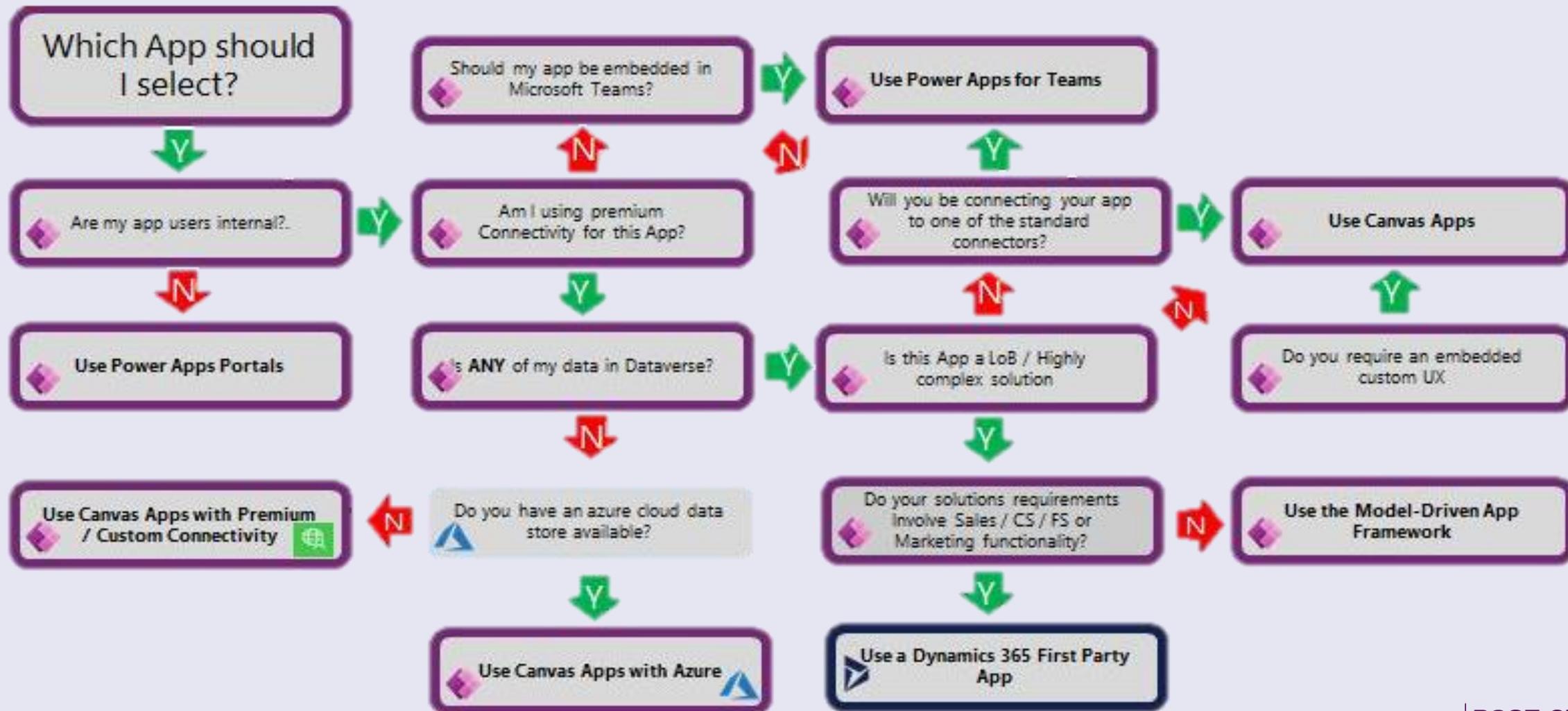
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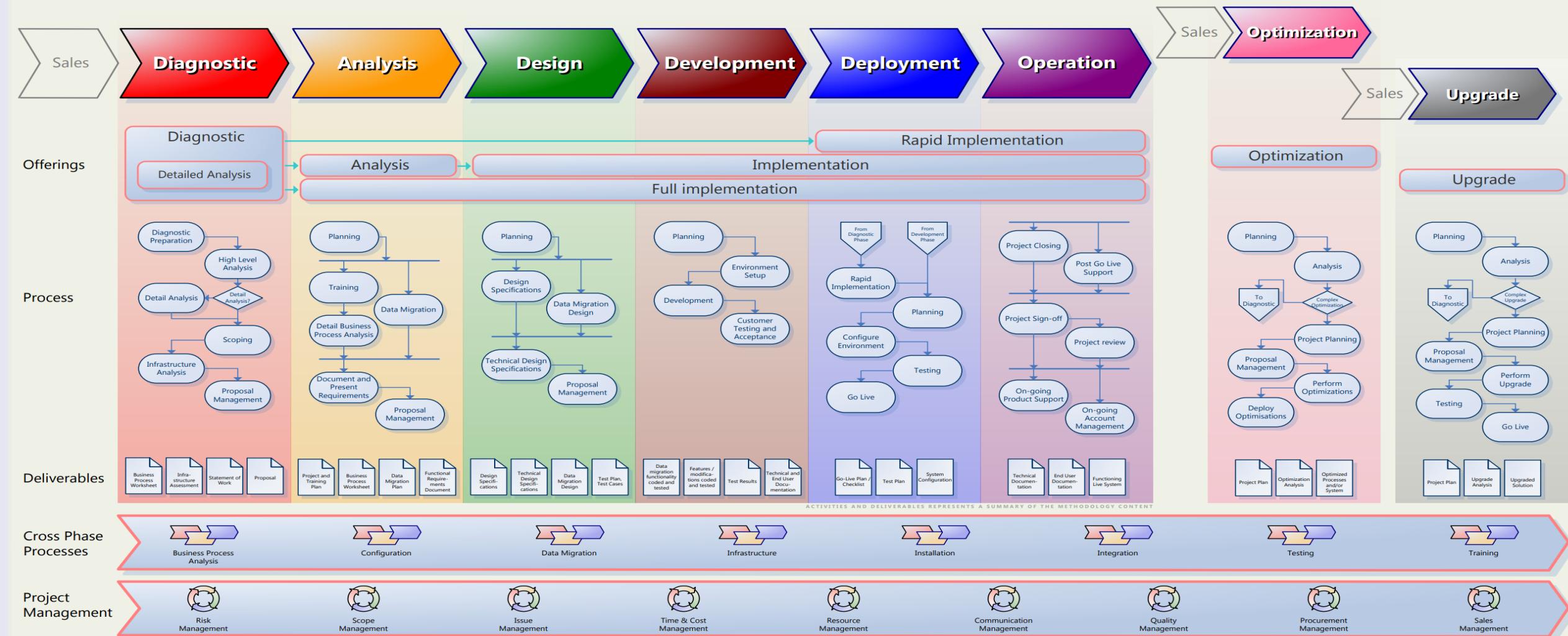
Which App should I select



By : Chris Huntingford @ThatPlatformGuy

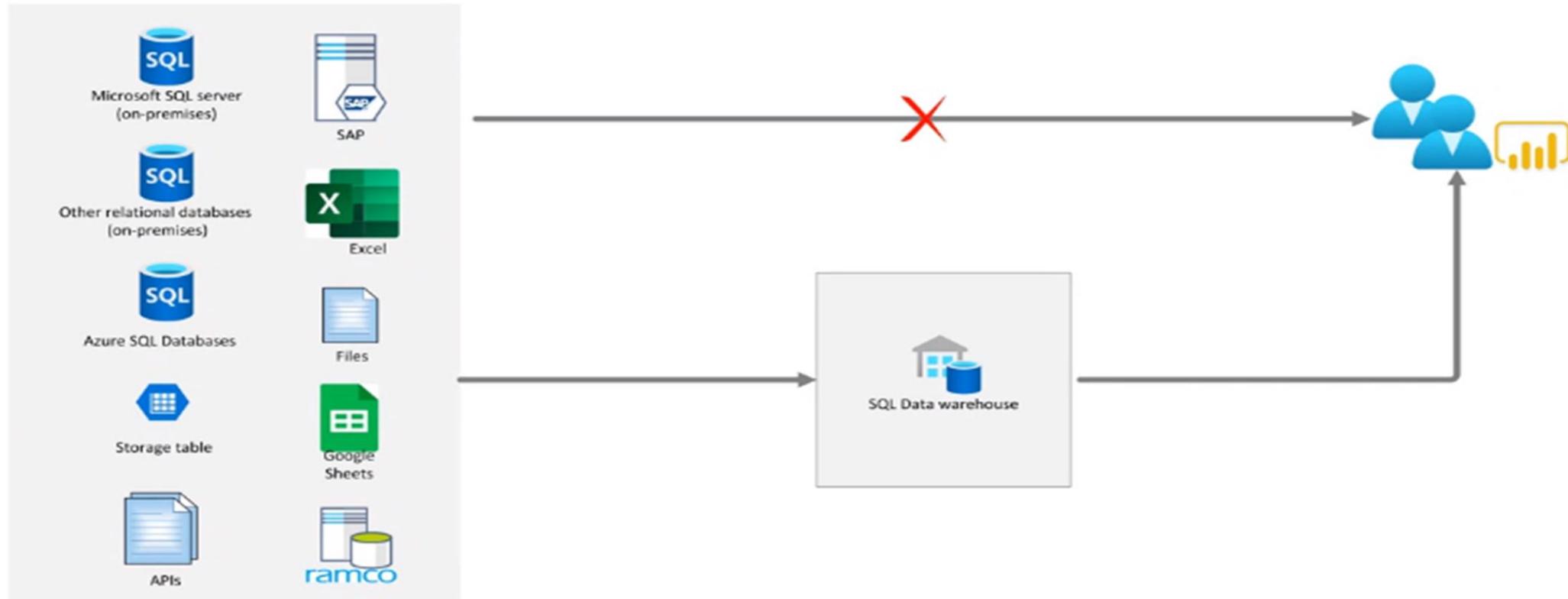


Microsoft Dynamics Sure Step



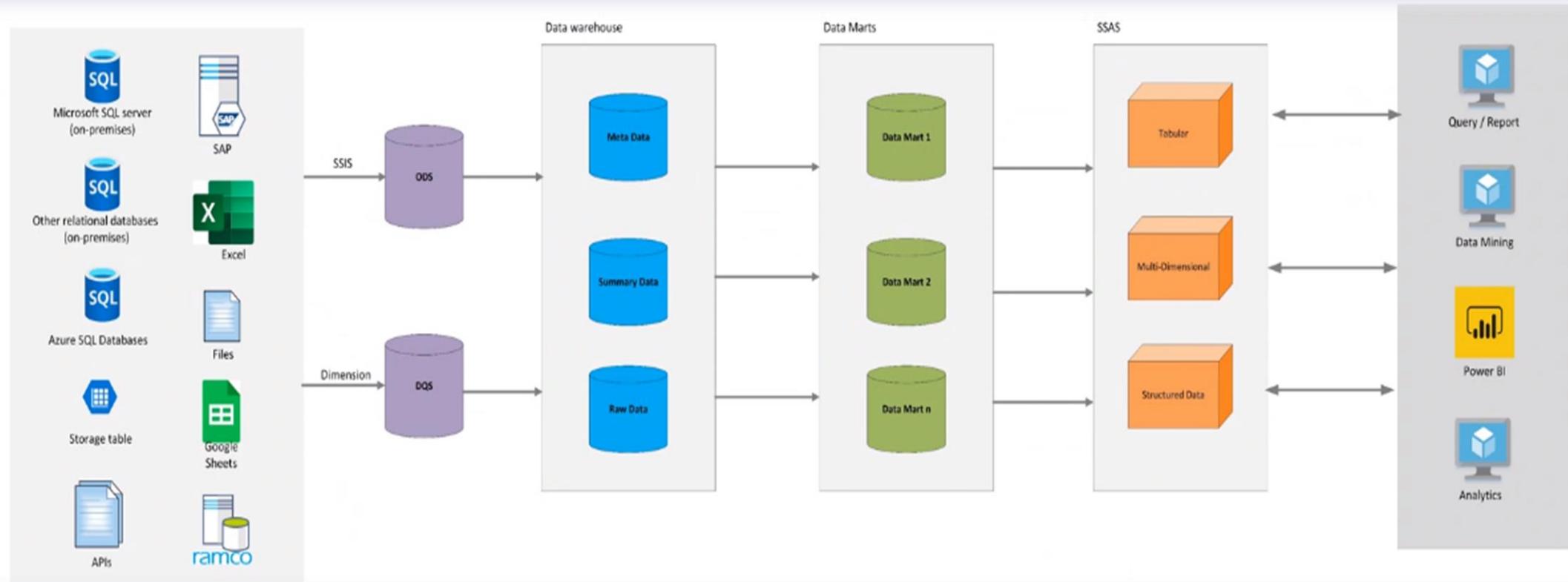
Phase	Deliverables
Project Initiation	Project Management Plan
Requirements Specifications	Requirement Specifications
Preliminary Design and Prototyping	Preliminary Design Specifications Prototype
Detailed Design	Design Specifications Functional Specification
System Configuration / Development	System configuration document Program Source Codes Unit Test Package
Installation	Software Installation Test Plan Software Installation Test Result Report
Data Conversion & Migration	Data Conversion and Migration Plan Migration Result report
System Integration Testing	System Test Plan System Test Package System Test Reports
User Acceptance	Training Materials User Acceptance Test Plan User Acceptance Test Package User Acceptance Test Result Reports
Implementation	Communication Plan Capacity Plan User Manual Operation Manual System Configuration Manual
Performance Guarantee Period Support	Project Completion Analysis Report
System Warranty Support	Post Implementation Review (PIR) Report
Maintenance	Maintenance Plan Maintenance Log Progress Report

High-level Data warehouse and Power BI Architecture

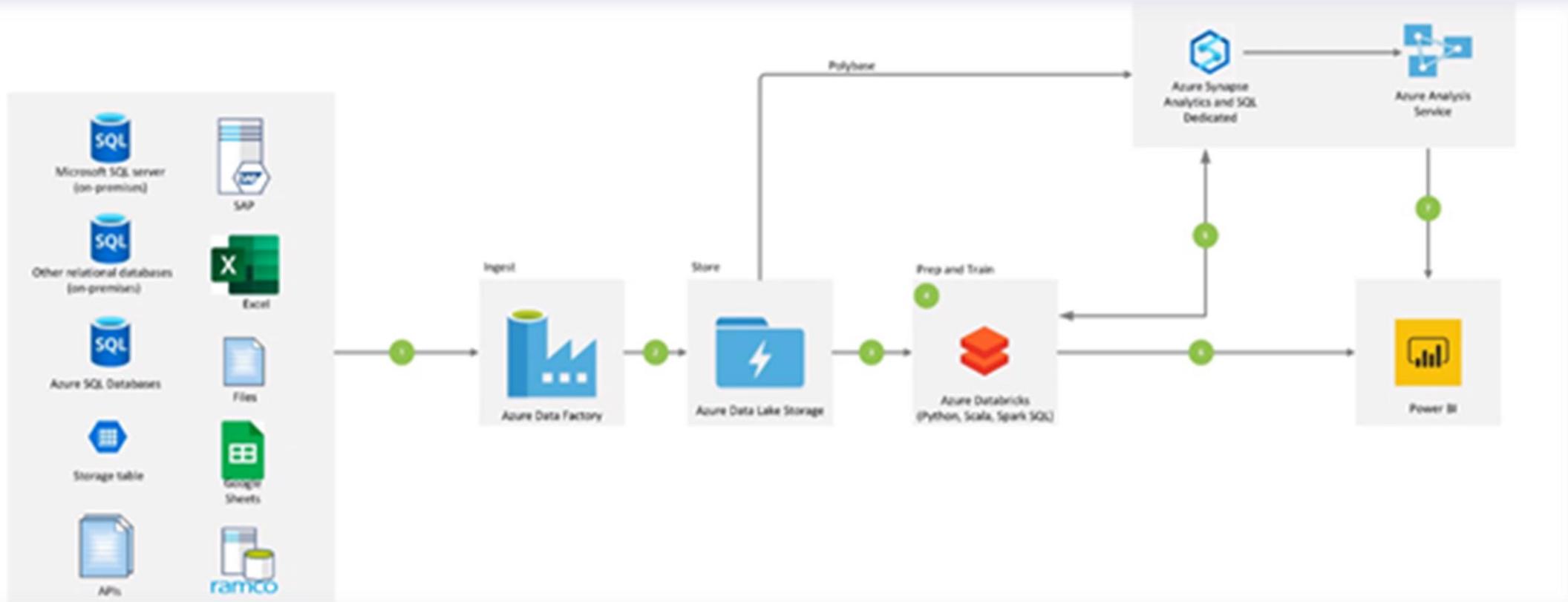


ARCHITECTURE DIAGRAM

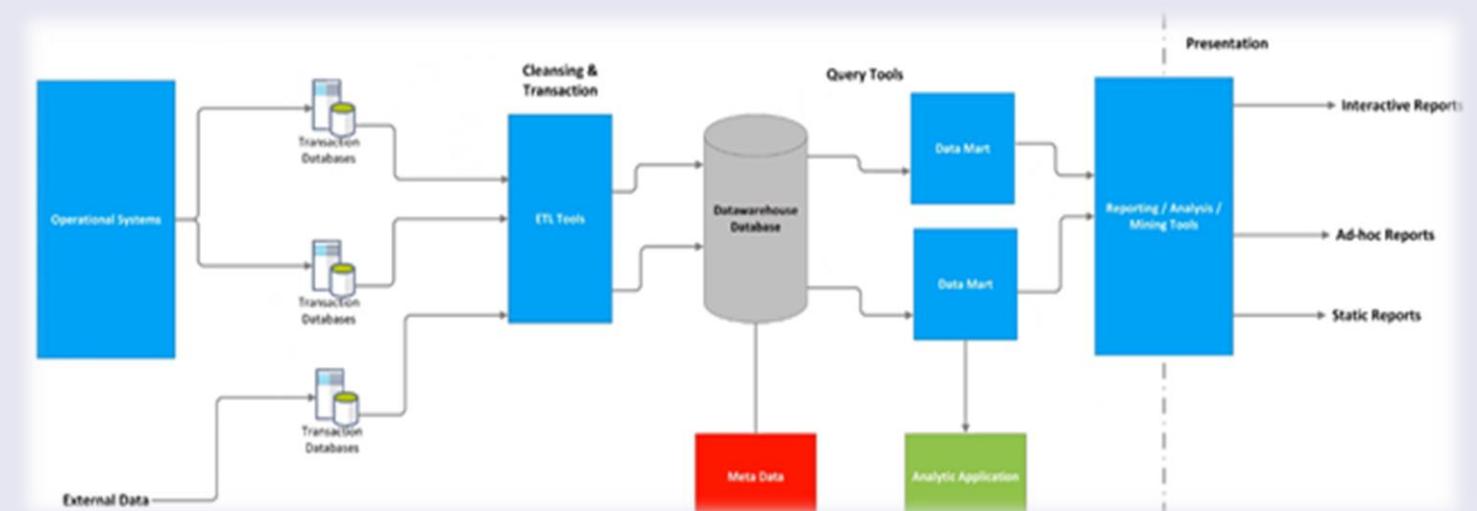
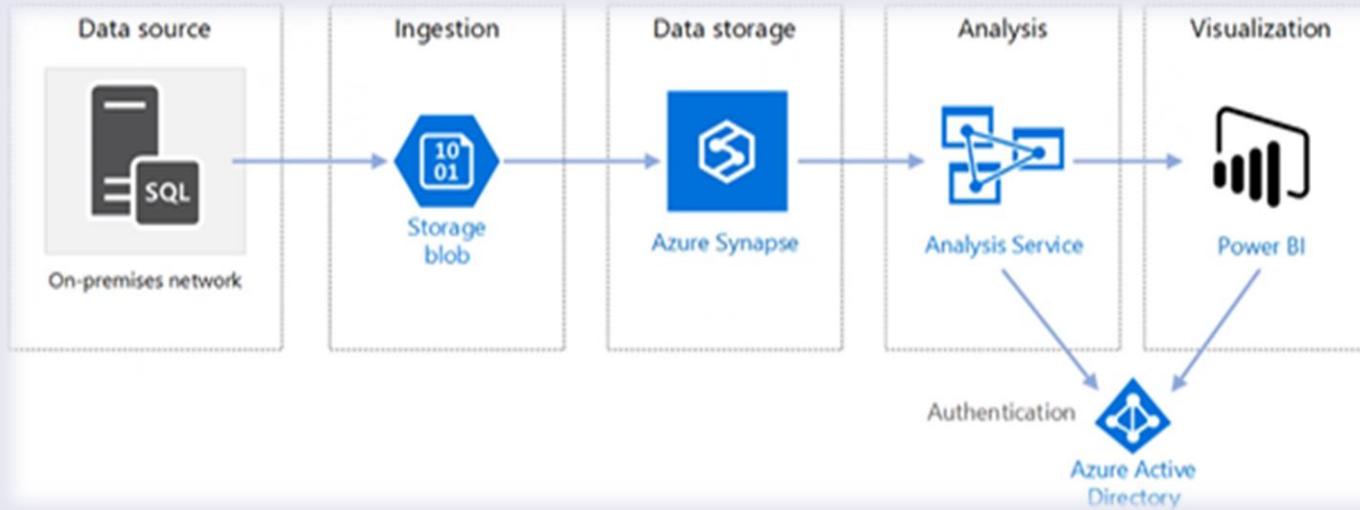
Data warehouse and Power BI Architecture in On Premise



Data warehouse and Power BI Architecture in Azure Cloud



High-level Data warehouse and Power BI Architecture

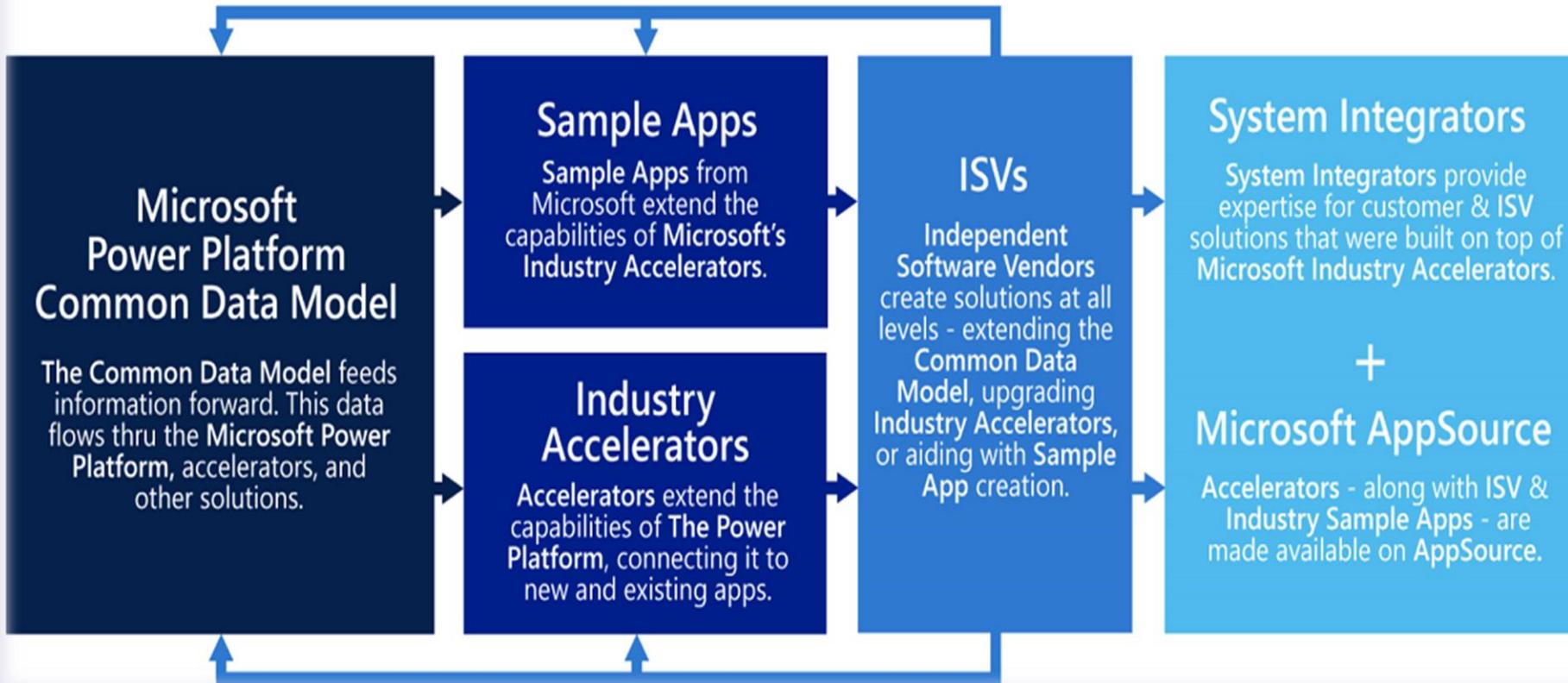


- **Azure Data Factory** : Cloud based ETL & Data Integration Service for transformation & Data movement at a scale.
- **Azure Data Lake Storage** : Microsoft Data Lake Storage is fully managed, elastic, scalable & Secure file system.
- **Azure Databricks** : Data Analytics platform optimised for Azure cloud services platform.
- **Azure Synapse** : Integrated Analytics Service which offers cloud data ware housing, dashboarding, Machine learning analytics with dedicated SQL pool which is used in enterprise data ware housing.
- **Azure Analysis Service** : Fully managed Platform as a Service(PaaS) that provides enterprise grade data models in cloud.

Industry Accelerators



ISV Opportunity Flow



- Automotive
- Education
- Healthcare
- Media & Entertainment
- Non-profit
- Telecommunication



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Demo using D365 Accelerators



