Dynamics 365 Implementation Estimate of Work

Provided by JourneyTEAM

Prepared exclusively for: Allied Global Marketing

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Content

Executive Summary

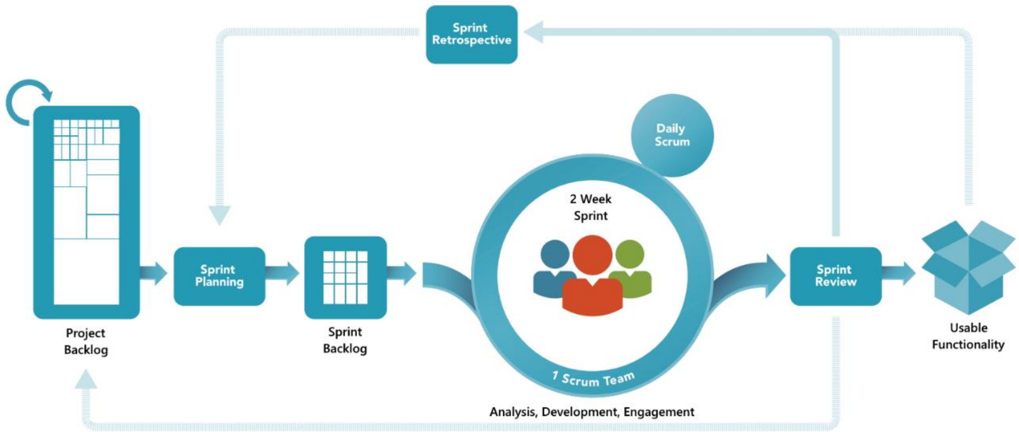
JourneyTEAM will engage with the Allied Global Marketing team to implement and configure Dynamics 365 CRM. This solution will provide a hub for all the contact information used by the Allied Global Marketing team, making this information more accessible and usable. This statement of work is not intended to be a detailed project plan that outlines every step that will be taken. This document is intended to give the Client an overview of the deliverables, assumptions, and risks.

JourneyTEAM Qualifications

JourneyTEAM is a Microsoft Gold Certified Partner with over 25 years of experience providing business technology solutions. We specialize in Microsoft Dynamics 365 ERP and CRM solutions, Office 365, SharePoint, Azure and Identity Management. Our experience and approach to implementations have a proven track record of success. JourneyTEAM consultants are Microsoft certified and bring together the various skillsets necessary to deliver complex business needs. Our mission is to improve the businesses and lives of others through the effective use of technology.

Project Approach

JourneyTEAM employs an adaptive agile/scrum implementation methodology approach as follows:



Partner with Customer for Delivery

- Work towards an agreed upon delivery/go-live date.
- The project team will plan work according to what both teams agree to accomplish during each cycle (see below) and work on building the project (product) backlog.
- During the project you will have three points of contact: Account Manager, Project Lead, and Project Manager.

Operate in Sprints

- We plan the work for each sprint at the end of the previous one and move to the sprint backlog
- Standard sprints last 2 weeks

Sprint Planning & Review

- We prioritize, clarify, and commit work
- We plan the tasks that will be completed in the next sprint period
- We review the work that has already been completed in the previous sprint and do a quick show and tell of what that completed work looks like

Project Status Reports (PSR)

- At the end of every sprint the Project Manager will deliver a Project Status Report
- The report summarizes sprint delivery, budget, risks, and remaining effort

Upon Execution of this agreement, JourneyTEAM will schedule a project kick off meeting to review this implementation process and to plan the project, providing timeline, milestones, and resource allocation.

To deliver an effective project, JourneyTEAM will need the following from the team at Jacobsen Construction:

- Create an Account with access to data sources with applicable licenses.
- VPN Access if necessary to access data sources.
- Power BI Pro or Power BI Premium per User license assigned to the account used by JourneyTEAM for report creation.

Access to subject matter experts for data validation and explanation of business processes:

- Bi-weekly attendance at sprint planning meetings from the project sponsor.
- Frequent and honest feedback throughout the project - both via in-person/virtual interactions and bi-weekly surveys.
- A server (physically near the data source) on which the On-premises Data Gateway may be installed.

Project Manager Assigned to Project

JourneyTEAM will assign a manager to this project to ensure successful completion. Your project manager (PM) will be the primary point of contact for progress throughout the course of the engagement. Primary activities to be accomplished by your PM include:

- Conduct daily stand-up meetings with JourneyTEAM project delivery team to ensure tasks are progressing and blockers are being removed
- Schedule working sessions with project team as needed
- Schedule bi-weekly sprint planning meetings to review progress made over the last two weeks and to prioritize work for completion in the upcoming two weeks
- Provide bi-weekly project status reports to client determined key stakeholders
- Communicate project progress and provide information on all changes, issues, and risks as they arise
- Create and manage a Microsoft Teams collaboration space for project team
- Be available for any emergent project needs

Project managers are assigned to managed JourneyTEAM projects with a fixed cost to ensure technical resources are not competing with project managers for time on the project. This approach allows project managers to spend as much time as necessary on each project. Project management fees will only be charged for billing cycles where project work was completed. Project management fees will stop at the completion of the project.

Adoption and Support Services

JourneyTeam is committed to the ***sustained adoption*** of this project. The long-term achievement of your business objectives is much more likely if 3 factors are met.

1. Reinforcement of the importance of the new system and process by ***responding quickly*** when users have a question or encounter a problem.
2. ***Iterative improvement*** as users become more familiar with the tool and how to optimize it for your specific use case.
3. ***Proactively monitoring*** of the health and usage of the system to identify potential roadblocks early before they grow into barriers to adoption.

JourneyTEAM's Adoption & Support Plans are focused on ensuring these 3 factors are met by:

- Connecting you with our dedicated support team
- Allocating specific consulting time to implement your update and enhancement requests
- Providing regular adoption and usage reports
- Configuring automated notifications to our support team if a critical flow, process or service fails
- Identifying recommendations for steps you can take to avoid security issues or other problems in the future

Scope of Work

Handoff - Sales Team & Project Team meeting to exchange knowledge, needs, and expectations to architect the project

Project Analysis, Validation & Planning

- Discovery and Analysis– Business process analysis and backlog creation of user stories for project delivery team. Identify requirements, milestones, use cases, and technology to solve current and future business needs. In addition, determine if the scope of the project is on target after engaging in discovery with additional stakeholders/end users related to the following implementation areas:
    - Scope Validation - Review executive summary/flag plant and ensure that it is accurate and encompassing of desired business objectives
    - Data Validation - Determine if the required tables, dashboards, and data driven processes included in scope align with business objectives
    - Data Migration Plan - Determine if the Data Migration Plan and tooling preferences are accurate based on the number of tables, data volume, and source data accessibility
    - Integrations - Determine if the integrations are scoped correctly based on data complexity, volume, triggers, tooling, and ensure that integrations align with business objectives
    - Marketo coordination - Review views and data points in Marketo and design data migration and data import best practices to templatize the import process and lay the foundation for an integration in a subsequent phase

Project Delivery

- Architecture & Design Sessions– Meetings, design sessions, and project backlog management done by the architects, developers, and functional consultants engaged on the project to align with the business needs and delivery timeline
    - Every Sprint (2-week period), the following meetings will occur by JourneyTEAM team members as well as customer stakeholders and end users as necessary: Backlog Refinement, Sprint Planning, and Sprint Review

Implementation

- Environment Set Up– D365 provides a flexible platform that determines security access, different UI forms and functions, and other Office 365 interactions natively on the platform.
    - D365 Environment Setup– instance setup and configuration to be used for sprint work items to build, test and deploy the functionality required to satisfy the business requirements.
- Security– D365 provides a flexible platform that determines security access, different UI forms and functions, and other Office 365 interactions natively on the platform.
    - Apps by Role & Navigation: Determine if the out of the box model driven applications (Sales Hub, Customer Service Hub, Customer Service Workspaces) are sufficient for end users, and/or create additional model driven applications to simplify
    - Security model design based on user types/groups and data needs

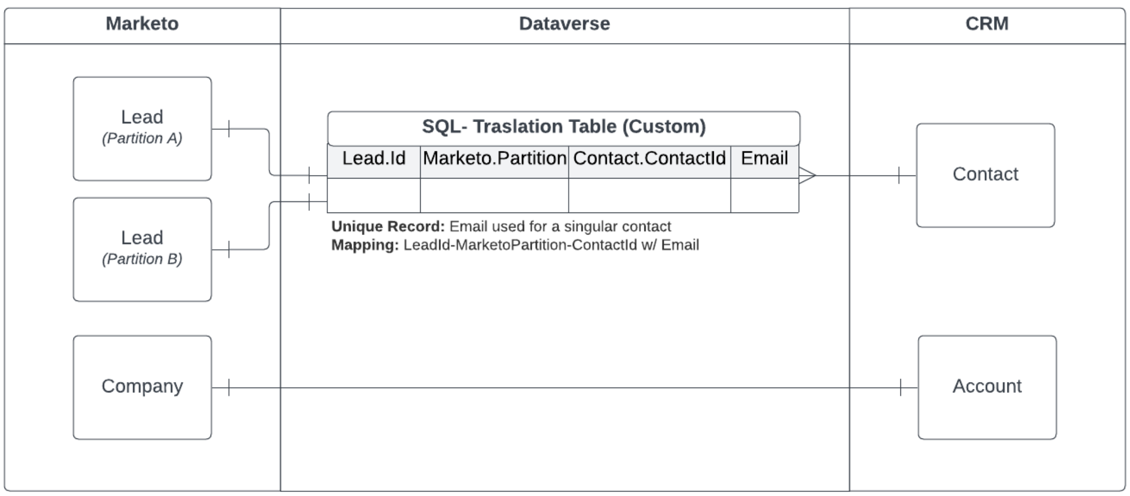
- Collaboration
    - Outlook Integration - Enables viewing of information about an email or appointment or link it to an opportunity, account, or case in your app
- Relationship Management – The account management, sales process setup and how information is used within the tool to create a more efficient, repeatable, and scalable function(s) within the organization
    - Account & Contact Management
        - Contact Management Plan for data consistency and accuracy - Define source of truth as necessary
        - Accounts - Represents a company or organization
            - **In B2C implementations, individual consumers will also have an associated Account record for separation between an individual's account where sales orders are associated and the contact record which captures individual consumer details*
            - **In Non-Profit implementations the Account record also represents Household type entities*
        - Contacts - Represents individuals, demographics, and contact preferences
        - Data Improvement
            - Duplicate Detection Rules- Enable detection rules to notify on possible duplicate records in your system
- Reports and Dashboards
    - Dashboards - Views, lists, and charts; an overview of actionable business data that's viewable across the organization. Use dashboards to see important data at a glance
- Data Migration Plan - Migrate data from existing data sources into Dynamics CRM
    - Tables
        - Accounts
        - Contacts
    - Tools
        - Data Import Utility - Out of the box import utility designed for simple data imports with no relational data or simple relational data
            - **If the data heavily relational, requires setting more than 5+ relationships per table(coming from another CRM or ERP system), there are more than 5 tables, and there is extensive data translations that need to occur, JourneyTEAM recommends using Kingsway Soft or similar SSIS tool to perform the mappings and data migration logic*
        - Data Import Utility Training - Train power users to use the Import Utility, build views, update data already imported into the system, and add new data
- Process Automation - Determine opportunities for automation and create Workflows, Plugins, Business Rules, Plugins, or Power Automate Flows to reduce manual tasks

- *Highly complex processes can be implemented at additional effort and will need to be identified as a change request*

- Marketo Integration
  - Integrate Customers bi-directionally from Marketo and Dynamics CRM and will run in a nightly job
    -

Tables	Normal Source	Normal Directionality
CONTACT (Lead)	Marketo	Bi-Directional

    - Included in scope is 1 table (in Marketo documentation this would be 1 API)
      - No other tables are included, if there are related tables are included in scope
      - **Any other tables can be integrated at additional cost (Roughly 16-32 hours including testing based on table complexity)*
  - Data Translations - expectations are 10-20 data points with directionality from Marketo -> CRM, and 5-10 data points with directionality from CRM -> Marketo



<u>Pre-Go-Live UAT</u>: Release Management preparation, adoption plan, testing and training of the system for to release to production and live usage

- Train Subject matter experts so that they can effectively train the end users
- <u>Testing & UAT</u> - Testing scenarios with the business to determine the data mapping and system setup is functional and correct

<u>Go-Live and Adoption</u>

- <u>Adoption & Change Management</u> – Rollout coordination of any change or training plans and materials needed for the organization and ensuring that importance of applications are set forth by leadership

- Go-Live Support - Testing scenarios with the business to determine the data mapping and system setup is functional and correct post deployment to production

Project Closure

- Project retrospective- Project team meeting with stakeholders to provide feedback to improve overall project delivery and the synergy related to our specific partnership
- Support and maintenance planning - provide client with support options and transition to support team
- Additional phase discovery sessions

Out-of-Scope Services

Products and services not specifically defined in the scope of this project are considered "Out-of-Scope". Examples of some of these services are listed below (not a complete list)

- No Additional Data Migrations– Data not expressly called out from an external system, outside of D365, that needs to be imported or mapped/migrated into the new environment being implemented by JourneyTEAM are not in scope of this project
- No Additional Integrations– Additional systems not expressly called out in the scope summary are not in scope of this project
- ERP Integrations - *This is normally the structure we do for BC integrations, in Allied Global Marketing's case, it might be a more simple implementation, and representative of what I have highlighted in red below. The source is not all inclusive of how things are, but this is specifically from the perspective of an end user in CRM (IE: an account can be created in BC and synced to CRM, but an account can be set to "Customer" in CRM and synced to BC as well)
    - Integrate Customers, Products (Includes Units and Unit Groups), and Orders

Tables	Normal Source	Normal Directionality
CONTACT	CRM	Bi-Directional
CURRENCY	ERP	One-Way
CUSTOMER (Account)	CRM	Bi-Directional
CUSTOMER PRICE GROUP	ERP	One-Way
ITEM-PRODUCT	ERP	One-Way
SALES ORDER-ORDER	CRM	One-Way
PAYMENT TERMS	ERP	One-Way
POSTED SALES INVOICE (Header)	ERP	One-Way
POSTED SALES INVOICE (Line)	ERP	One-Way

SHIPMENT METHOD	ERP	One-Way
SHIPPING AGENT	ERP	One-Way
UNIT OF MEASURE	ERP	One-Way
VENDOR	ERP	One-Way

- **Any other tables can be integrated at additional cost (Roughly 16-32 hours including testing based on table complexity)*
    - *Examples of additional tables include: Dimensions, Service Items, and Invoices*

- Data Visualization or Advanced Reporting –standard out of the box reporting is included in the D365 estimate and platform (basic aggregates; Min, Max, Count, Sum, Average) and what can be done with common views (list of filtered records), charts and dashboards (combined views/charts). Training in Power BI is offered and would educate the client on how to build advanced reporting. In addition, Power BI requires additional licenses outside of the Dynamics licenses
- Collaboration
    - Teams Chat and Channels - Easily connect a Dynamics 365 record to an existing Teams channel or create a new team or channel. Engage in a Teams chat conversation from within Dynamics 365 while working on a record
    - SharePoint Integration - Store the documents related to Dynamics 365 entity records in SharePoint. Quickly access, share, and manage these documents from the application
        - *One Note Integration is available if SharePoint Integration is implemented*
        - **This is the out of the box integration (table and/or Account & Contact based), discovery will identify if this is sufficient or if SP integration needs to be customized to fit existing SP folder structure and hierarchy*
- Dynamics Sales
    - Sales Process
        - Leads - Use leads to keep track of unqualified business prospects
        - Opportunities - Create an opportunity when the lead is almost ready to buy. With an opportunity, you can forecast sales revenue, set a potential close date, and factor in a probability for the sale to occur
        - Quotes - Create a quote when the opportunity is ready to buy/commit to products/services
            - Apply any calculations and logic as necessary for the quoting process
        - Orders - Create an Order when the Quote is confirmed by the recipient and there is a commitment to pay for products/services
        - Business Process Flows - Progress bar; guide users to ensure repeatable process and data capture
            - The Business Process Flow out of the box encompasses Lead -> Opportunity -> Quote -> Order, this can be tailored based on needs

- **IE: The process can end at the Opportunity if quotes and orders are not necessary for the implementation*
- Branching - Business Process Flows can be configured for multiple lines of business based on which steps are required that might be unique for different lines of business, IE:
  - Product offering ABC requires steps 1, 2, and 3
  - Product offering XYZ, requires steps 1, 2, 3, and 4
  - Product offering MNO requires steps 1, 3, and 4

- Marketing for Sales - Out of the Box Marketing Feature
  - Marketing Lists - A list, updated manually or automatically, of customer records.
  - Campaigns - Use campaigns to store all your marketing information and activities, and to measure the success of your efforts
  - Quick Campaigns - Automatically distribute a single activity to selected accounts, contacts, or leads, or to a single marketing list
- Sales Administration
  - Sales Territories - Improve sales potential and revenues by creating territories for customer and market segments in Dynamics 365 Customer Engagement (on-premises). Then assign appropriate salespeople to handle the sales and revenue opportunities for those territories
- Performance Management
  - Goals - Track your progress on achieving target revenue or other targets set by your organization
  - Goal Metrics - Measure goals in terms of count or amount, depending on what you're measuring
  - Rollup Queries - Specify additional criteria that you want to apply on existing goal metrics
  - Forecast - A forecast helps your organization predict how much revenue your sales team will generate in a given time frame

- Collateral & Product Catalog
  - Product Catalog Settings - Configure the settings to change the seller experience while selecting products from the catalog
  - Families and Products - Make it easier for sales agents to find products and services in a product catalog by creating a product family and classifying similar products
  - Discount Lists - Offer products to your customers on marked down rates
  - Price Lists - Price list items to define price for a product
    - **These can be configured at the Account level if there are Account specific Price Lists (This is not included in scope and will require additional effort based on the complexity of the price list implementation)*
  - Unit Groups - Define the quantities or measurements that you sell your products or services in by using units

Estimated Investment

JourneyTEAM will bill for services in a time and material manner at a project billing rate of $275/hour (discounted from $315/hour). Final cost may be greater or less than this estimate based on actual work performed. Travel time during business hours will be chargeable at 50% of the project billing rate. Travel expenses will be billed to the customer at actual cost. Any travel will be pre-approved by client.

WBS ID	Project Task Name	Est. Hours	Est. Investment
1	Project Handoff	6	$1,650.00
2	Project Analysis, Validation & Planning	16	$4,400.00
3.1	Architecture, Design, and Engagement	52	$14,300.00
4.1.1	D365 Environment Setup (Dev, Test, and Prod environments)	6	$1,650.00
4.1.2	Security Matrix Design and Implementation	28	$7,700.00
4.1.3	Mobile App - Dynamics for Sales Training	4	$1,100.00
4.1.4	Outlook Integration Configuration and Training	12	$3,300.00
4.2.1	Account Configuration	12	$3,300.00
4.2.2	Contact Configuration	12	$3,300.00
4.3.1	Dashboards (6 per Dashboard)	18	$4,950.00
4.4.1	Data Imports (8 hours per table Import) - Accounts and Contacts	16	$4,400.00
4.4.2	Data Import Training and Support (Import Template creation, and Import Wizard)	12	$3,300.00
4.5.1	Simple Automations (1-3 processes at 1-4 hours each)	8	$2,200.00
4.6.1	Marketo - Customer Bi-directional sync	64	$17,600.00
5.1	End User Training	8	$2,200.00
5.2	Testing & UAT	12	$3,300.00
6.1	Adoption & Change Management Coordination	16	$4,400.00
6.2	Go-Live Support	16	$ 4,400.00
7.1	Project Retrospective	2	$550.00
7.2	Support and Maintenance Planning	4	$1,100.00
7.3	Discovery of Work for Future Phases Planning	2	$550.00
TOTAL		326	$89,650.00

Non-hourly Services/Products	Est Quantity	Est Investment
Project Management - $1,500 twice per month	7	$10,500
TOTAL		$10,500

TOTAL SERVICES	$100,150

Client Responsibilities

This project will succeed as our teams work together with a common goal. It will require the dedicated efforts of everyone involved and is sometimes inherently stressful. To control costs and achieve a successful deployment, our team will expect much from your project team. This estimate of work is based on a set of assumptions; these assumptions have been collected by preliminary meetings and discussions with Client. If any assumptions are in question, they must be brought to the attention of JourneyTEAM immediately, discussed, and resolved before the project continues.

We are confident that we will be able to work together professionally and pleasantly through what is naturally a demanding project and will achieve a successful outcome. While not an exhaustive list, some of the responsibilities we will expect of you are:

- Provide timely and accurate information regarding your business processes.
- Provide the necessary management direction and project resources in a timely fashion to support project deadlines and requirements.
- Appoint and make available a Project Manager (or other primary point of contact) designated to work with JourneyTEAM for all aspects related to the completion of services and who will have authority to act on behalf of Client.
- Client is responsible for all hardware, software, and licensing components for this project.
- Provide reasonable remote access to all systems via a secure mechanism.
- Provide reasonable access to all systems required to resolve issues.
- Provide a development, test and production environment. The development and test environments will possess the exact same software, including software version and representative data, as in production.
- Provide experienced and capable staff for training as required by the project.
- Make adjustments to business processes to accommodate functionality of the new software.
- Execute any facility and/or infrastructure changes that have been identified or are required to support the new solution.
- Create test plans defining test scenarios, test cases, and test data to be used during testing. Coordinate third party vendors, not contracted by JourneyTEAM, if required.
- Perform full end to end user acceptance testing of the solution/system prior to go live and confirm that the functionality meets their requirements.

**Client agrees that go live will not happen until they are able to perform full end to end user acceptance testing. Any attempt to go live without proper full end to end user acceptance testing could require the production launch hours estimated below to be multiplied exponentially.*

Signature: ______________________________

Name: ______________________________

Title: ______________________________

Date: ______________________________