DYNAMICS 365 SOLUTIONING SCENARIO

A Digital Transformation Journey

Brought to you by:

OCP Technical Team

Table of Contents

Scenario Background

Contoso is one of the big 5 CPA firms in the US. As such they engage with a diverse set of customers around three primary service lines: Tax Engagements, Audit Engagements, IT Project Engagements.

Contoso is undergoing a digital transformation of their business. As part of this transformation Contoso is looking to revamp the technology they use to run their business. The goal of this transformation for Contoso is to gain greater visibility and insights into every one of their customer engagements. Below is a listing of the key Business Objectives for this digital transformation:

- More accurate sales forecasting
- Customer Engagement Portal
- Enterprise billing system replacement
- Centralized Project Management & Delivery
- Employee Time & Expense Entry
- Employee Recruit & HR Management
- Centralized reporting / analysis across all systems

Business Objective Details

More Accurate Sales Forecasting

Contoso is currently using Salesforce as it internal CRM system for capturing and managing new deals. Their CRM system allows Contoso Sales Reps to track their Opportunities and manage to a central pipeline.

Today, Contoso is being faced with the challenge that their reps are not providing an accurate forecast for the deals that they are pursuing. In most cases, the reps are over-forecasting their deals, which consequently causes the sales pipeline to become falsely inflated.

In the future, Contoso would like to provide their Sales Reps better information to help guide them to a better estimate on each of their deals. To achieve this, Contoso would like to take all their historical insights around their past engagements, and use these insights to help drive a "recommended" estimated revenue.

Ultimately Contoso is looking to understand if there are other CRM offerings that are better aligned to their current technology investments and can subsequently provide them more proactive and insightful information. Contoso understands that their needs might take some customizations to meet their exact needs, but they are ultimately looking to understand the pieces that are involved in making this happen.

Customer Engagement Portal

Contoso currently has no way to allow their customers to participate and gain access to the information related to the engagements that are being performed. Not having the ability to allow customers to participate within each engagement causes Contoso employees to have to manually capture their customers information as it relates to the engagements. Additionally, all engagement project updates (statuses) are delivered manually today via email.

Going forward, Contoso would like to have a central customer engagement portal that would allow Customers to have access to all their current as well as historical engagements. When interacting with these engagements, Customer not only need to be able to access all the information, they also need the ability to update / upload additional information. The Customer Engagement Portal needs to be secured down to each customer such that they can only see and work with their company's engagements. Contoso wants to maintain and manage the identities for this portal and do not want to load all their customers identities into their Active Directory.

There will be a need to upload numerous documents as they relate to the individual engagements. These documents can be large, and thus the disk storage used to store these documents needs to be cost effective.

Contoso does not want to host this portal themselves, and instead want it to be cloud hosted. The data captured from the portal does need to be reported on in an easy fashion.

This portal also needs to enable each customer to get updates on the project engagements and act as a part of the overall engagement. This means that at times, tasks within an engagement may get assigned to the customer directly for completion. The completion of this task will directly impact the overall project engagement delivery.

Enterprise Billing System

Contoso is currently using an older ERP system to run their business. They are looking to modernize their ERP system in hopes of streamlining some of their back-office operations. In addition to this, they desire their ERP system to be connected both from a reporting perspective but also from a process perspective to their future front-office systems. Contoso is also looking to deliver customer billings via the net new Customer Engagement Portal.

Centralized Project Management & Delivery

Contoso is currently using Microsoft Project to plan and execute their engagements with their customers. This is currently working, but requires a lot of manual communication / updates and does not enable the entire delivery team to collaborate

on their projects. Additionally, the Sales Team does not have any visibility into the projects and their delivery after they have Won their Opportunities.

Going forward, Contoso would like a Project Delivery system that allows all project team members to collaborate on the projects that they are assigned. Activities that team members need to perform are:

1. Complete assigned tasks and enter time spent
2. Enter any expenses associated to the project
3. Look for new projects to engage on
4. Access all project information on their mobile devices

In addition to a highly collaborative project delivery system, Contoso also wants this system to connect directly with the CRM and the ERP. Connecting the project system to the CRM system would allow Contoso to further gain insights into how they are estimating their engagements and how this ultimately can help drive the success of the project. Since the project system is capturing time and expense, Contoso needs this system to connect to their ERP system to prevent duplicate entry for billing and payment purposes.

Finally, all projects need to be exposed to the customer via the Customer Engagement portal. This allows customers to review billings, project timelines, open tasks, and participate in assigned tasks.

Employee Time & Expense Tracking

Contoso currently use Excel and their dated ERP system to capture employee time and expenses. This system has been unstable and has not scaled well as Contoso has grown in size / complexity. Contoso needs the ability for their employees to enter their time and expenses directly within their project management tool. More importantly these employees need the ability to enter this information on the go and capture details, like receipts via their mobile phone.

Employee Recruit & HR Management

Contoso is currently managing their recruit and onboarding process via a custom developed system that runs on SharePoint 2010 on premise. The key struggles that HR has had with this system revolve around getting data out of the system and relating it to other data within their business. Additionally, as other online recruit tools, like LinkedIn, have evolved, their home-grown system has not been able to keep pace. Contoso is evaluating whether they should upgrade / re-write this system or if there is "off the shelf" solutions that can better suit their needs.

Centralized reporting / analysis across all systems

Contoso currently utilizes many different technologies throughout the business for their reporting needs. This fragmented approach to gaining insights has reduced Contoso's ability to get a wholistic view of the business. Their current reporting tools look to capture information from all their key business systems. Today, Contoso has many Excel spreadsheets that frontline managers use for day to day reporting and operations. The Sales team does most of their reporting natively inside Salesforce with the built-in tooling. Other business units within Contoso use QlikView to normalize and aggregate information from multiple data sources. About 3 years ago, Contoso started an initiative to build a traditional top-down approach for their analytical needs (building a data warehouse). This initiative utilizes Microsoft SQL server and runs on premise. Although the project offers great promise, it has failed to launch as Contoso is finding it hard to define all their needs up front.

Going forward, Contoso is looking at other options that can help them be more agile in their data decisions while also centralizing all their analytical tooling into one solution that can be exposed within other applications.

Scenario Objectives

Contoso is looking to reduce the total number of vendors that they use to solve all the business challenges above. Contoso is a Microsoft customer and has already moved to Office 365 and Azure with the following workloads:

- Azure Active Directory Federated
- Exchange Online
- SharePoint Online
- Azure IaaS

As Contoso looks to the future, they see the cloud playing a key role to their transformation. That said, they need to understand what the building blocks of the overall solution are and how they come together as one holistic system.

Your challenge, should you accept it, is to map out a high-level solution that solves the key issues outlined in each of the Business Objectives above.