

# Microsoft Dynamics 365 Customer Engagement (CE) Design and Delivery

Service Definition Document

Sopra Steria



# Contents

- 1 About Sopra Steria .....2
  - 1.1 Overview .....2
  - 1.2 Our Cloud Capability .....3
  - 1.3 Our Credentials .....4
- 2 Service Overview .....5
  - 2.1 Service Description .....5
  - 2.2 Features .....5
  - 2.3 Benefits .....6
  - 2.4 Our Approach .....6
  - 2.5 Inputs .....7
  - 2.6 Outputs & Deliverables .....8
  - 2.7 Certifications & Skills .....8
- 3 Pricing .....9
- 4 Next Steps .....9
  - 4.1 Contact .....9
  - 4.2 More Information .....9

# 1 About Sopra Steria

## 1.1 Overview

### About Sopra Steria

Sopra Steria, a major Tech player in Europe with 50,000 employees in nearly 30 countries, is recognised for its consulting, digital services and solutions. It helps its clients drive their digital transformation and obtain tangible and sustainable benefits. The Group provides end-to-end solutions to make large companies and organisations more competitive by combining in-depth knowledge of a wide range of business sectors and innovative technologies with a collaborative approach. Sopra Steria places people at the heart of everything it does and is committed to putting digital to work for its clients in order to build a positive future for all. In 2024, the Group generated revenues of €5.8 billion.

The world is how we shape it

Sopra Steria (SOP) is listed on Euronext Paris (Compartment A) – ISIN: FR0000050809 For more information, visit us at [www.soprasteria.com](https://www.soprasteria.com)

**50,000**

employees

**€5.8bn**

2024 revenue

**Top 5**

European digital  
services companies

In nearly

**30**

countries



## 1.2 Our Cloud Capability

Sopra Steria Cloud Practice brings together leading digital, cloud and engineering expertise to accelerate transformation for our clients.

- Delivering comprehensive digital and cloud transformation, including strategic consulting, change management, large-scale migration, application modernisation, next-generation development and secure, optimised operations
- Integrating deep capability across applications, data, infrastructure, cloud platforms and security, supported by industrialised assets to enable solutions across Private, Public, Hybrid and Sovereign Cloud environments
- Using an end-to-end cloud delivery model that integrates business, engineering, security and operations, ensuring continuous innovation, strong governance, and measurable business value throughout the full cloud lifecycle.

1.3 Our Credentials

Capacity

More than 15,000 cloud experts in 30 countries  
(Vision, Ops, Design, Scale)

Market recognitions

- Large account (best category>\$250m) in the "Public Sector Industry Cloud Landscape" (Forrester)
- Leader "Cloud public in Europe" & "Next Gen Private & Hybrid Cloud" (ISG)
- Leader "Cloud Infra Brokerage" (NelsonHall)
- Best in Class "Azure" & "SAP" & "Service Now" (PAC Radar)
- Leader "Cloud Native Application" & "Application Transformation Services" (Quadrant)
- Major Contender "Cloud Services" & "Cloud Native Applications" & "Services on AWS Azure & CGP" (Everest)

Key partners



Main market recognitions

2<sup>nd</sup> in IT Services in France and 10<sup>th</sup> in EMEA\*

| Cybersecurity                                                                                                                                                                                                        | Digital                                                                                                                                                                                                                                                                                                                          | AI                                                                                                                                                                                                                                                                                                                                                                                             | IT for Green                                                                                                                                                                                                                                                                    | Cloud                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                       |                                                                                       |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Leader "Cyber resiliency services" (NelsonHall)</li><li>• Leader "cybersecurity" in France &amp; Germany (ISG)</li><li>• Top 5 "cybersecurity" in France (Markess)</li></ul> | <ul style="list-style-type: none"><li>• Leader "Application Transformation Services" (Quadrant)</li><li>• Leader "Digital Banking" (NelsonHall)</li><li>• Leader "Digital Banking Services" (ISG)</li><li>• Major Contender "Digital twin Services" (Everest)</li><li>• Innovator "Digital Manufacturing" (NelsonHall)</li></ul> | <ul style="list-style-type: none"><li>• Leader AI Services &amp; Gen AI (PAC Innovation Radar)</li><li>• Leader AI Services (Quadrant)</li><li>• Leader "Intelligence Process Automation" (Quadrant)</li><li>• Major player "European Professional Services for Data-Drive" (IDC)</li><li>• Major contenders "AI services" &amp; "Intelligent Process Automation services" (Everest)</li></ul> | <ul style="list-style-type: none"><li>• Leader "ESG for Banking Services" (NelsonHall)</li><li>• Best in class "consulting and digital services for sustainable development" (PAC Innovation Radar)</li><li>• Major Contender "NetZero Consulting Services" (Everest)</li></ul> | <ul style="list-style-type: none"><li>• Large account (best category&gt;\$250m) in the "Public Sector Industry Cloud Landscape" (Forrester)</li><li>• Leader "Cloud Infra Brokerage" (NelsonHall)</li><li>• Best in Class "Azure" &amp; "SAP" &amp; "Service Now" (PAC Radar)</li><li>• Leader "Cloud Native Application" &amp; "Application Transformation Services" (Quadrant)</li><li>• Leader "Cloud public in Europe" &amp; " Next Gen Private &amp; Hybrid Cloud" (ISG)</li><li>• Major Contender "Cloud Services" &amp; "Cloud Native Applications" &amp; "Services on AWS Azure &amp; CGP" (Everest)</li></ul> |                                                                                       |                                                                                       |
|                                                                                                                                   |                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  |  |

\* Source PAC 2024

## 2 Service Overview

### 2.1 Service Description

Microsoft Dynamics 365 Customer Engagement (CE) Design and Delivery provide end-to-end cloud support services for public sector organisations implementing, enhancing, or maintaining D365 CE solutions. Our service covers the complete solution lifecycle from initial discovery and architecture design through to implementation, migration, training, and ongoing support.

We specialise in delivering D365 CE solutions for Sales, Customer Service, Field Service, and Marketing modules, fully integrated with the Microsoft Power Platform (Power Apps, Power Automate, Power BI, Power Pages) and Azure services. Our approach is tailored for UK public sector requirements, helping organisations achieve compliance with GDS standards, WCAG 2.2 AA accessibility requirements, and government security standards. With proven experience delivering complex D365 CE implementations for organisations including Transport for London, the Construction Industry Training Board, and the Information Commissioner's Office, we understand the unique challenges of public sector digital transformation including procurement requirements, information governance, accessibility obligations, and multilingual service delivery.

Our service model provides flexible engagement options from project-based design and implementation through to managed service support, ensuring your D365 CE investment delivers maximum value throughout its operational lifecycle.

### 2.2 Features

- Solution Architecture & Design - Enterprise-grade D365 CE architecture aligned with Microsoft best practices and government technology standards
- Power Platform Integration - Seamless integration design for Power Apps, Power Automate, Power BI, and Power Pages within D365 CE ecosystems
- Azure Services Integration - Implementation of Azure Functions, Logic Apps, Service Bus, API Management, and Azure AD B2C
- Multi-Environment Management - Design and configuration of development, test, UAT, and production environments with robust ALM processes
- Data Migration Services - Comprehensive migration design and delivery from legacy systems using Microsoft tooling and custom ETL processes
- Security Configuration - Role-based access control, multi-factor authentication, data loss prevention, and encryption implementation
- Accessibility Compliance - WCAG 2.2 AA testing and remediation for Power Pages portals and model-driven applications
- Custom Development - Plugins, custom workflows, Power Automate flows, PCF controls, and Web API integrations
- DevOps & ALM - Azure DevOps pipelines, solution packaging, version control, automated deployment, and release management
- Multilingual Support - Configuration and implementation of multi-language solutions including Welsh language compliance
- Performance Optimisation - Load testing, performance tuning, query optimisation, and capacity planning
- Third-Party Integration - RESTful API integration with external systems, legacy applications, and SaaS platforms
- Training & Knowledge Transfer - Role-based training programmes, documentation, and train-the-trainer delivery

- Support Services - Tiered support model with proactive monitoring, incident management, and problem resolution

## 2.3 Benefits

- Accelerated Digital Transformation - Faster implementation timelines through proven methodologies and reusable accelerators
- Reduced Implementation Risk - De-risked delivery through experienced public sector practitioners and established governance
- GDS Alignment - Solutions designed to help achieve Government Digital Service standards and assessment requirements
- Cost Optimisation - Right-sized licensing, infrastructure efficiency, and reduced total cost of ownership
- Enhanced User Adoption - Comprehensive training and change management support driving successful user uptake
- Improved Accessibility - Inclusive digital services helping achieve WCAG 2.2 AA compliance and accessibility obligations
- Regulatory Compliance - Solutions aligned with UK government security standards, GDPR, and sector-specific regulations
- Operational Efficiency - Process automation, workflow optimisation, and elimination of manual tasks
- Scalability & Flexibility - Solutions designed to scale with organisational growth and changing requirements
- Security Assurance - ISO 27001 and Cyber Essentials Plus certified delivery with security-cleared personnel
- Faster Time to Value - Rapid deployment of proven solutions accelerating realisation of business benefits
- Continuous Improvement - Proactive support model identifying optimisation opportunities and emerging capabilities
- Reduced Vendor Lock-in - Open architecture and comprehensive documentation supporting knowledge transfer
- Welsh Language Support - Bilingual service delivery supporting Welsh Language Standards compliance
- Future-Proof Architecture - Forward-compatible designs leveraging Microsoft's product roadmap and emerging capabilities

## 2.4 Our Approach

Our approach to D365 CE Design and Delivery follows a structured methodology:-

**Discovery & Assessment Phase** We begin with comprehensive business process analysis, stakeholder engagement, and current state assessment. This includes reviewing existing systems, understanding user needs, identifying pain points, and documenting requirements. We conduct accessibility audits, security assessments, and integration landscape reviews to inform solution design.

**Solution Design Phase** Our architects develop detailed solution blueprints covering data model design, security architecture, integration patterns, customisation strategy, and environment strategy. Designs incorporate GDS service standards, WCAG 2.2 AA accessibility requirements, and government security baselines. We create technical specifications, wireframes, process flows, and architecture decision records.

**Build & Configuration Phase** Our development teams configure D365 CE modules, build custom components, develop integrations, and create automated workflows. We follow agile sprint methodologies with regular

demonstrations and stakeholder feedback loops. All development adheres to Microsoft best practices with comprehensive unit testing and code reviews. Solution components are version-controlled through Azure DevOps with automated build and deployment pipelines.

**Data Migration Phase** We design and execute data migration strategies including data profiling, cleansing, transformation, and validation. Migration tooling includes Microsoft Data Import Framework, custom SSIS packages, Azure Data Factory pipelines, and C# migration utilities. We conduct multiple migration iterations across test environments before production cutover.

**Testing & Quality Assurance Phase** Comprehensive testing includes functional testing, integration testing, performance testing, security testing, and accessibility testing. We use automated testing frameworks (EasyRepro, Playwright) for regression testing and support user acceptance testing coordination. Test evidence is documented for compliance and audit purposes.

**Training & Change Management Phase** Role-based training programmes are delivered through multiple channels including classroom sessions, virtual instructor-led training, and e-learning content. We provide administrator guides, user manuals, quick reference cards, and video tutorials. Train-the-trainer programmes build internal capability for sustainable adoption.

**Go-Live & Hypercare Phase** Controlled go-live approach with detailed cutover planning, rollback procedures, and go/no-go criteria. Post go-live hypercare support provides intensive monitoring, rapid incident response, and user support during initial adoption period.

**Ongoing Support & Continuous Improvement Phase** Managed service support includes proactive monitoring, incident management, change requests, and regular health checks. We provide quarterly service reviews identifying optimisation opportunities, emerging Microsoft capabilities, and continuous improvement recommendations.

Throughout delivery we maintain strong governance with regular project reporting, risk management, issue tracking, and stakeholder communication. All activities are delivered by security-cleared personnel where required and comply with your organisation's information security policies.

## 2.5 Inputs

We would expect the following inputs from you as part of this service:

- Business Requirements - Documented business processes, user needs, functional requirements, and success criteria
- Stakeholder Access - Access to key stakeholders, subject matter experts, and decision-makers for workshops and reviews
- Current System Access - Access to existing systems, databases, and applications requiring integration or migration
- Security & Compliance Requirements - Information security policies, data classification standards, and regulatory requirements
- User Accounts & Licences - Provision of D365 CE licences, Azure subscriptions, and user accounts for development and testing
- Environment Access - Administrative access to D365 CE environments, Azure tenants, and related infrastructure
- Data Samples - Representative data samples for migration testing, development, and user acceptance testing
- Integration Endpoints - API documentation, credentials, and technical contacts for third-party system integrations
- Accessibility Requirements - Specific accessibility needs, assistive technology requirements, and WCAG compliance expectations
- Testing Resources - User availability for UAT, test scenarios, test data, and acceptance criteria

- Network & Infrastructure Details - Network architecture, firewall rules, VPN access, and infrastructure constraints
- Branding Assets - Logos, colour schemes, style guides, and brand guidelines for UI customisation
- Training Participants - User lists, training schedule availability, and training venue/platform access
- Support Contact Details - Incident escalation contacts, on-call rotas, and communication preferences
- Change Management Approval - Formal approval processes, change windows, and deployment authorisation procedures

This is a high-level list and is not exhaustive. If you cannot provide all of these inputs, then we can discuss altering our approach to accommodate your situation.

## 2.6 Outputs & Deliverables

Some of the outputs and deliverables generated from the service are identified below:

- Discovery Documentation - Current state assessment, requirements specification, user research findings, and gap analysis
- Solution Architecture Document - Technical architecture, data model design, integration patterns, security design, and infrastructure topology
- Technical Design Specifications - Detailed technical designs for customisations, integrations, workflows, and custom components
- Data Migration Strategy - Migration approach, data mapping specifications, transformation rules, and validation criteria
- Test Plans & Test Cases - Comprehensive test documentation covering functional, integration, performance, security, and accessibility testing
- Configured D365 CE Environments - Fully configured development, test, UAT, and production environments with deployed solutions
- Custom Development Components - Plugins, custom workflows, Power Automate flows, PCF controls, Azure Functions, and API integrations
- Data Migration Deliverables - Cleansed and transformed data loaded into D365 CE with validation reports and reconciliation evidence
- Power Pages Portals - Branded, accessible external-facing portals with Azure AD B2C authentication
- Training Materials - User guides, administrator manuals, quick reference cards, training presentations, and video tutorials
- Knowledge Transfer Sessions - Formal handover sessions covering solution architecture, support procedures, and system administration
- Security Documentation - Security architecture, RBAC configuration, DLP policies, and security test reports
- Azure DevOps Repositories - Source-controlled solution components, build pipelines, release pipelines, and deployment documentation
- Go-Live Pack - Cutover plan, rollback procedures, go-live checklist, and post-implementation review documentation
- As-Built Documentation - Complete technical documentation reflecting final implemented solution configuration

This is a high-level list and is not exhaustive.

## 2.7 Certifications & Skills

Some of our certifications and skills related to this service are identified below:

- Microsoft Solutions Partner - Designation for Data & AI, Digital & App Innovation, and Business Applications

- Microsoft Certified: Dynamics 365 Customer Engagement Functional Consultant Associate
- Microsoft Certified: Power Platform Developer Associate
- Microsoft Certified: Power Platform Solution Architect Expert
- Microsoft Certified: DevOps Engineer Expert
- Microsoft Certified: Azure Solutions Architect Expert
- Microsoft Certified: Azure Administrator Associate
- Microsoft Certified: Azure Security Engineer Associate

This is a high-level list and is not exhaustive.

## 3 Pricing

Please refer to the Pricing Document for this Service.

## 4 Next Steps

### 4.1 Contact

Please contact us if you would like to know more about any of our listings on G-Cloud.

Email: [sector-support@soprasteria.com](mailto:sector-support@soprasteria.com)

As all of our G-Cloud enquiries initially come into a single contact, please remember to tell us:

- \*Your name, your organisation name and contact details
- Which service you are enquiring about
- A brief summary of your requirements or problem statements that you would like support to address.

### 4.2 More Information

More information about our services and capabilities can be found on our website [here](#).

