



Microsoft Dynamics 365 Customer Engagement G-Cloud 15: Service Definition Document

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Mphasis Overview

Mphasis has 15+ years of experience in delivering successful digital transformation programs for central and local government entities across the globe. We offer the opportunity to accelerate their digital journey with a wide range of solutions cost-effectively, allowing maximum reusability of their current legacy systems. We understand the unique nature of the public sector's needs and challenges, and our offerings enable the right transformation to enable continuous adaptation for improved outcomes.

Mphasis is a leading applied technology services company with 20+ years of experience in delivering successful digital transformation for our clients across the globe. Incorporated in 1998, Mphasis is a multinational IT software consulting services company which provides Integrated services offerings in Application, Infrastructure & Business Process Services. We offer organisations an opportunity to accelerate their transformation journey with a wide range of technology solutions. Currently, we operate in 22 countries with more than 37,000 plus employees and 71 delivery centres with annual revenue of \$1.4Bn and a Market Cap of \$7Bn.

Mphasis' Service Transformation approach helps 'shrink the core' through digital technologies across legacy environments within an enterprise, enabling businesses to stay ahead in a changing world. Mphasis core reference architectures and tools, speed and innovation with domain expertise and specialisation are key to building strong relationships with marquee clients.

Mphasis: A Trusted Microsoft Partner

Microsoft Solution Partner | Committed to growth – partnership, solutions and capability build | 'Growth Partner' in NA (2024)




 Microsoft Solutions Partner
 Infrastructure Azure


 Microsoft Solutions Partner
 Digital & App Innovation Azure


 Microsoft Solutions Partner
 Data & AI Azure


 Microsoft Solutions Partner
 Business Applications
 Specialist Supply Chain Finance


 Microsoft Solutions Partner
 Modern Work


 Microsoft Solutions Partner
 Security
 Specialist Cloud Security Threat Protection

1810+ MS Certified Azure Engineers	240+ MS Certified Data & AI Engineers	110+ MS Certified Digital & App Innovation Engineers	210+ MS Certified Infrastructure Engineers
180+ MS Certified Business Application Engineers	140+ MS Certified Security Engineers	60+ MS Certified Modern work Engineers	30+ Azure marketplace listings
15+ AI/ML Azure marketplace listings	09+ IP CoSell Azure marketplace listings	01 Microsoft AI Foundry "Top 5 Winning Solution"	

- Acquired a **UK Dynamics company with 18-yr experience** across D365 FSCM, D365 CRM, Power Platform, managed services
- **Proven experience** in transforming business landscapes to **become Microsoft ready**
- **"Top 5 Winning Solutions"** in the Microsoft AI Solution Foundry competition - Mphasis MedTech AI Chatbot
- **Partner Advisory Council Member** for Application Modernization and Java Modernization
- Grew **358%** in Azure Consumption in 2 years
- **Approved in UK** to tap into Microsoft programs (AMM, ECIF, Fasttrack)

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Service Overview

What the service is

Mphasis Microsoft Dynamics 365 offering is a Secure Azure Cloud platform for Digital Transformation. It forms the bedrock for Interoperability across all of Finance, Supply Chain Management, Manufacturing, Planning, including DDMRP, Public Sector Procurement, Project Management and Accounting, AI / Co-Pilot for Finance, Sales, Customer Service, Marketing, Field Service, Analytics, Omni-Channel, Citizen Engagement.

Mphasis, a Microsoft Gold Partner, delivers end to end Microsoft Dynamics 365 Customer Engagement, integrating Customer Insights Journey for Marketing, Sales, Customer Service, Field Operations, Omni Channel, and Power Platform analytics. Our approach streamlines interactions and provides a unified platform for modern customer, citizen, and stakeholder engagement.

Solution

Our Microsoft Dynamics capabilities



150+

Dedicated Dynamics Resources



Specialist Support & Managed Services for Dynamics 365

20+

Years of Experience



Microsoft Cloud Solutions designated, specialised Partner

100+

Active Dynamics Clients

What we provide

Solutions as a Service (E2E Ownership)	Analytics & Migration (Hybrid way)
Augmentation (Ongoing partnership)	Low code/No code (Hybrid way)

Business Applications

D365 CE + Power Platform

- Enhance Customer Engagement through Service, Sales & Marketing
- Enterprise Automation with Power Platform
- AI using Copilot

D365 F&SCM

- Transform Finance
- Optimize Supply Chain Management

Analytics

- Business Intelligence analytics and reporting
- Data migration staging

Cloud Services

- Migrate from on-prem to Azure
- Support & Managed Services



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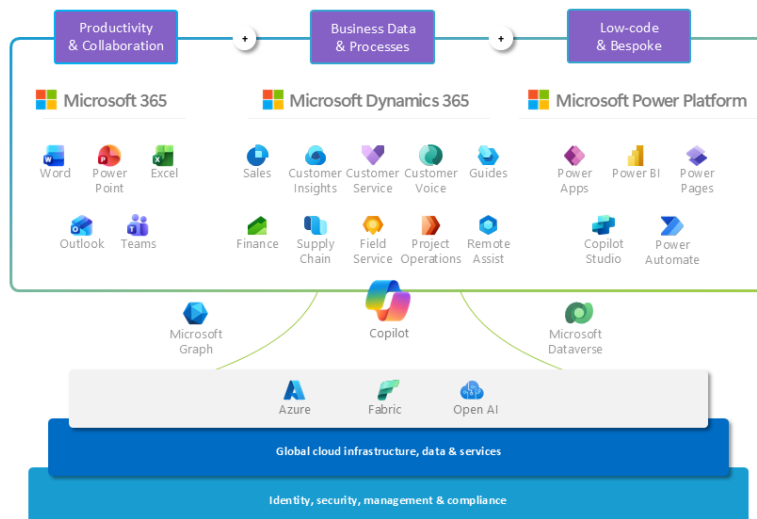
Microsoft Business Applications COE Services



MBAC is a **System Integrator** for Microsoft Services:

Dynamics 365 (ERP)
Finance & Supply Chain
Dynamics 365 (CRM)
Customer Engagement
Microsoft (Low-Code)
Power Platform
MBAC (Help Desk & Infrastructure)
Managed Services

We are a Microsoft **Designated Partner** and a Microsoft accredited specialist in **Finance and Supply Chain Management**:



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Service Features

- D365 CRM/CE implementation (Microsoft Gold Partner / Microsoft Solutions Partner)
- D365 CRM/CE on-premises to cloud upgrade/migration, rollout, support
- Customer Insights & Journeys for personalised engagement
- Sales Management for pipeline, forecasting, and relationship tracking
- Case Management for structured workflows and SLA automation
- Field Service for mobile workforce management
- Omni Channel & Call Centre across voice, chat and digital channels
- Power Platform automation using Power Apps & Power Automate
- Business Intelligence with Power BI dashboards and analytics
- Copilot AI assistance for productivity, insights, and automation
- Integration between Dynamics 365 CE and third party or enterprise systems.
- Automated test scripts and frameworks to ensure high quality, error free releases.

Microsoft Dynamics 365 capabilities include:

- Customer Service - build great customer relationships and increase satisfaction by delivering a great service. Includes Case Management, Routing, SLA's and Knowledge.
- Sales - empower sales teams to sell more effectively and efficiently with a comprehensive solution that automates sales processes, provides insights into customer needs and preferences, and fosters collaboration across teams and channels. Includes Opportunity Management, Quote and Order Management, Product Catalogue, Sales Performance Management, Sales Gamification, and AI for Sales.
- Sales Copilot - enhance sales productivity and performance with AI-powered guidance and insights that help sellers close more deals faster and smarter. Includes Conversation Intelligence, Relationship Analytics, Predictive Forecasting, Pipeline Intelligence, and Deal Manager.

- Customer Insights Journeys - marketing automation to progress prospects into customers. Includes email marketing, event management, campaign management, personalized customer journeys, lead nurturing and customer satisfaction surveys.
- Field Service - Field Service enhanced by the Mphasis Field Service Accelerator and Mphasis Intelligent Survey allows clients to streamline and automate their services improving efficiency, reducing costs, increasing visibility, and improving customer satisfaction to enable growth. Includes Scheduling and Dispatch, Asset Management, Mobility, Inventory, Preventative Maintenance and Cost tracking.
- Omni-Channel and Call Centre - enables organisations to instantly connect and engage with their customers via digital channels like Social media, Chat, Facebook and SMS and using their voice channel Benefits.

Benefits

- Leader in Dynamics 365 deployments
- Complete 360-degree view across sales, service, and customer interactions
- Deliver personalised, compliant, and data driven engagement journeys
- Improve efficiency with automated workflows, SLAs, and omni channel routing
- Empower field teams with real time scheduling, mobility, and asset visibility
- Provide self-service experiences through secure portals powered by Power Pages
- Enhance decision making with Power BI and Customer Insights analytics
- Reduce operational workload using AI driven assistance from Copilot
- Scale easily with modular Dynamics 365 capabilities across the Cloud
- Ensures clean accurate data transitions with minimal disruption to operations.
- Improves efficiency and reduces effort through unified real time data. "

Business Continuity and Disaster Recovery

Microsoft maintains automated backups of the business and financial reporting databases for 28 days for production environments and 7 days for sandbox environments.

Microsoft creates full backups every week, differential backups every 12-24 hours, and transaction log backups every 5 to 10 minutes. These backups enable a database to restore to a point in time within the configured retention period.

The backups are stored as storage blobs that are replicated to a paired region for protection against outages impacting backup storage in the primary region. If your data protection rules require that your backups are available for an extended time (up to 10 years), you can configure long-term retention.

Onboarding and Offboarding Support

Once a project has successfully been awarded, Mphasis will work with the customer to obtain the necessary licences for users and initiate the project based upon the Mphasis Sure Step evolve methodology below. Mphasis will work directly with client to ensure a smooth client specific offboarding process.

After Sales Support

Mphasis's Microsoft Business Applications Support team offer global technical and functional support and managed services for all Microsoft Dynamics 365 products. The UK&I Practice

currently managed over 100 customers across all products, with 30 dedicated support consultants employed.

These products include ERP solutions (from AX2009 through to D365 Finance, Supply Chain Management and Commerce), CRM (Dynamics 365 CE Sales, Customer Service, Field Service Customer Insight – Journeys and Project Operations Biz Apps), Power Platform (Power BI, Power Apps, Power Pages and Copilot Studio).

The team also support a number of internal IP products owned by Mphasis to assist each product. For each product, 24x7 coverage is available, with options around P1 ticket resolution only or a full 24x7 follow-the-sun approach, delivered solely by Mphasis teams globally.

A central Mphasis Helpdesk and online ticketing portal for customers allows fast triage and assignment to resources when required. SLAs provided with each contract allow the quality and speed of raised ticket resolutions to be managed and reported against each working day. Azure Cloud Service Managed Service support is also available for clients that require focused support and monitoring on their systems architecture, with 24x7 monitoring, alerting and resolution available. Mphasis have a dedicated Microsoft Update Services department also, with responsibility on behalf of a large number of clients to update their product versions each month.

This includes each Wave Release from MSFT that may add or remove functionality to each product. The service takes ownership of updates including the creation of quarterly plans with the customers, focused and tailored Release Notes and dedicated communication consultants that organise each update as they are formerly agreed and scheduled. The service includes testing where required and applying Microsoft and ISV bug fixes within the scope of the contract. The team offer support partnerships for Incident, Problem, Change and Release Management, following ITIL Framework Methodology with published SLAs and reporting via dedicated Service Delivery Managers.

Different levels of support are available, with flexible deals available alongside standard packages that customers prefer to select. Application Managed Service (AMS) contracts are available to provide dedicated resources to customers and to take ownership of a wide variety of technical tasks and administrative functions on behalf of the client. New customers are onboarded either via the Delivery teams through the warranty and handover process or through an audit that is carried out for each new partner. This readiness assessment allows all parties to understand the stability of the system being supported, processes for raising issues and any known issues that are to be understood or resolved.

Access to Data (Upon Exit)

There are many ways to ensure GDPR Compliance within Microsoft Dynamics 365 ranging from Data Entities and Entity Management, replacing identifying fields (within a data record) with artificial identifiers (pseudonyms), Full anonymisation, Using the Azure Data Inventory to tag personal data, utilising the compliance manager and more. Our expert consultants will guide you as to the best way to achieve this in your organisation.

Further details can be found here:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/gdpr/gdpr-guide>

Security

Microsoft operates the Microsoft Cyber Defence Operations Centre, a cybersecurity and defence facility manned by security experts and data scientists that work to protect

Microsoft's cloud infrastructure, detecting and responding to threats around the world 24/7. This provides security practises beyond the Edge, through the layers of security within the Microsoft datacentres and integrated protection through the Azure management portal to help protect your Dynamics 365 instance from malware, ransomware, and other online threats.

Microsoft work with auditors and regulators around the world to ensure that Microsoft operate datacentres at the highest levels of security and operational excellence. Ensuring they are compliant with local, industry, and international standards establishes that Microsoft is trustworthy and can be trusted.

<https://www.microsoft.com/en-gb/security/business/threat-protection>

<https://www.microsoft.com/en-gb/security/business/information-protection>

Microsoft datacentre status history and root cause analysis can be found here:

<https://status.azure.com/en-us/status/history/>

Azure Active Directory (AAD) simplifies the management of users and groups and enables you to assign and revoke privileges. Dynamics 365 users are assigned to role(s) which allow them to carry out their duties on the system, e.g. Purchase Ledger manager, Financial Controller etc. If a user needs temporary access to carry out additional duties, then an administrator can add additional role(s) to their user account. These additional roles can then be removed after they have completed the work. The System administration module in Dynamics 365 provides the ability for administrators to review and amend user access and the role(s) assigned to users.

Microsoft Dynamics 365 has the ability to perform task-based security audits down to a single data point to audit when users have been granted a "Role" to see when permissions have been granted and to create automated alerts, but these would need to be set up first.

Further information can be obtained here:

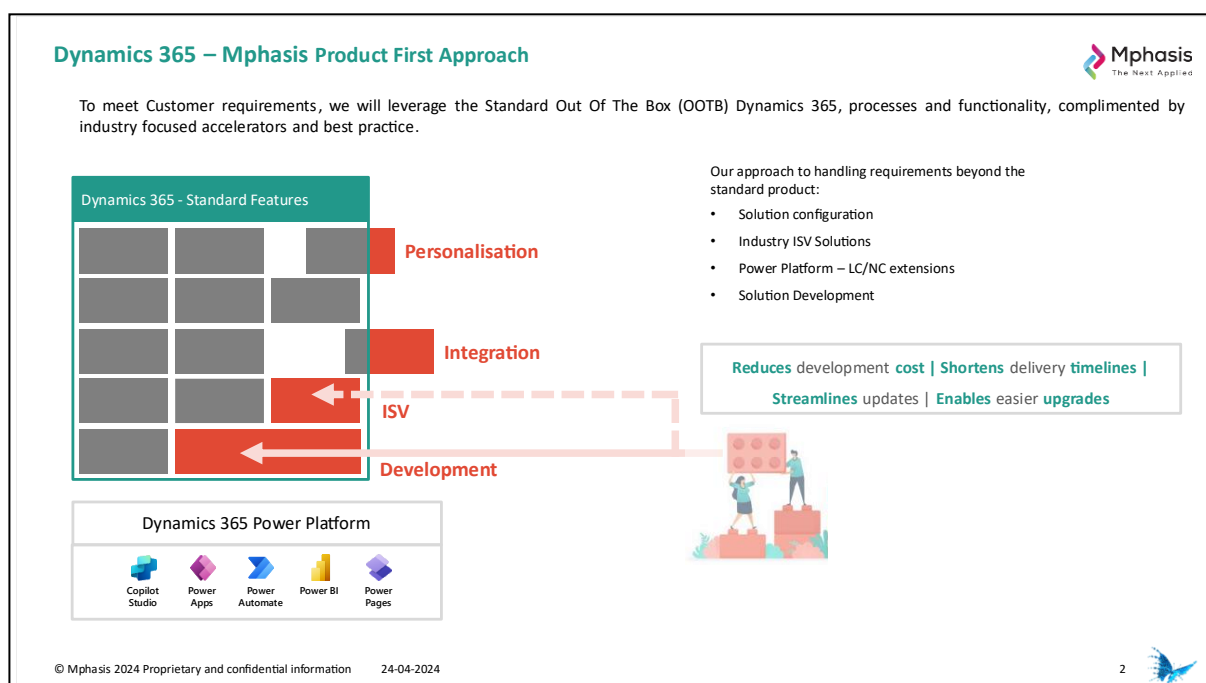
<https://docs.microsoft.com/en-us/azure/active-directory/fundamentals/active-directory-manage-groups>

Service Definition

Mphasis delivers projects using our Sure Step Evolve Methodology which takes, as its starting point, the industry-standard and best practice Microsoft's Sure Step framework, enhancing with a 'system-led', or Simulation, approach. Pivotal to how Mphasis operates and to the Sure Step Evolve Methodology is our Product First Principle.

Product First means positioning standard Dynamics features and functionality at the heart of our solutions. We map customer requirements to standard functionality first and foremost, confirming those that can be met through standard product and quickly identifying anything that may be a deviation or 'gap'.

Below is a graphical representation of how this principle has been applied to a set of customer requirements.



Those requirements confirmed to be met through standard functionality have been mapped across from the right-hand side and are shown as black boxes sitting inside what represents standard D365 capability.

Areas coloured red signify customer requirements that are not met through standard product and are therefore considered gaps.

Even before Mphasis considers options such as a minor modification, an integration or an ISV, we will always dive deeper into the 'red' requirements to determine the best course of action.

It is worth noting that the ISV box has been deliberately 'greyed out' and replaced by a red box sitting inside the standard D365 capabilities.

This is because the majority of ISV solutions are embedded within the Dynamics application and look and feel, to the End User, as if they are still using standard D365 functionality.

Our aim is to provide customers with solutions that are as close to standard as possible; clean, adhering to best-practice, future-proofed, easy to adopt and maintain. Our experienced Functional will challenge customers on identified gaps and show standard functionality, adopting the default question: "why won't standard Dynamics provide what you need?".

Often a small gap can easily be plugged by a minor business process change in the organisation, to come in line with the best practice process flows available through Dynamics 365. If a strong and demonstrable business case exists for a gap to be addressed via a modification, integration or ISV, Mphasis will investigate the specific requirement in more detail to accurately ascertain how much effort is required to implement as part of the overall solution. If initial estimates for pre-defined and identified gaps have been produced in the sales and pre-sales cycle, these will be further honed.

If gaps are identified through the requirements gathering process, they will be added to the Requirements Backlog alongside the configuration requirements and estimated at that point.

We refer to our Sure Step Evolve Methodology as being ‘system-led’, not just because we place standard functionality front and centre in all project activity, but due to the Simulations, or SIMs, we dovetail into the project delivery framework.

These conference room playbacks of the solution, at key milestones throughout the project, allow customers to see the system being built to meet their individual requirements. In a Standard implementation, we include the following Simulations / Playbacks:

SIM0: Base Solution Overview At the end of Survey & Setup.

This initial walk-through of the standard product confirms the ‘art of the possible’ and sets customer core team members up for the subsequent, intensive training in the User Enablement Phase.

SIM1: Design Confirmation At the end of Detailed Design.

This initial system walk-through, led by Mphasis, confirms the standard solution build using customer data and scenarios. Solutions are proposed for identified gaps but not yet completely configured. This provides an early opportunity to visualise the solution in context and confirm customer requirements have been fully gathered and understood.

SIM2: Solution Confirmation At the end of Build.

This complete system walk-through, including developments and interfaces, is delivered in partnership by Mphasis and the customer, in presentation format to the customer Project Sponsor and Board. It gives all involved the confidence that the configured solution is fit for purpose and the customer has the right level of solution ownership.

SIM3: Deployment Readiness At the end of Acceptance.

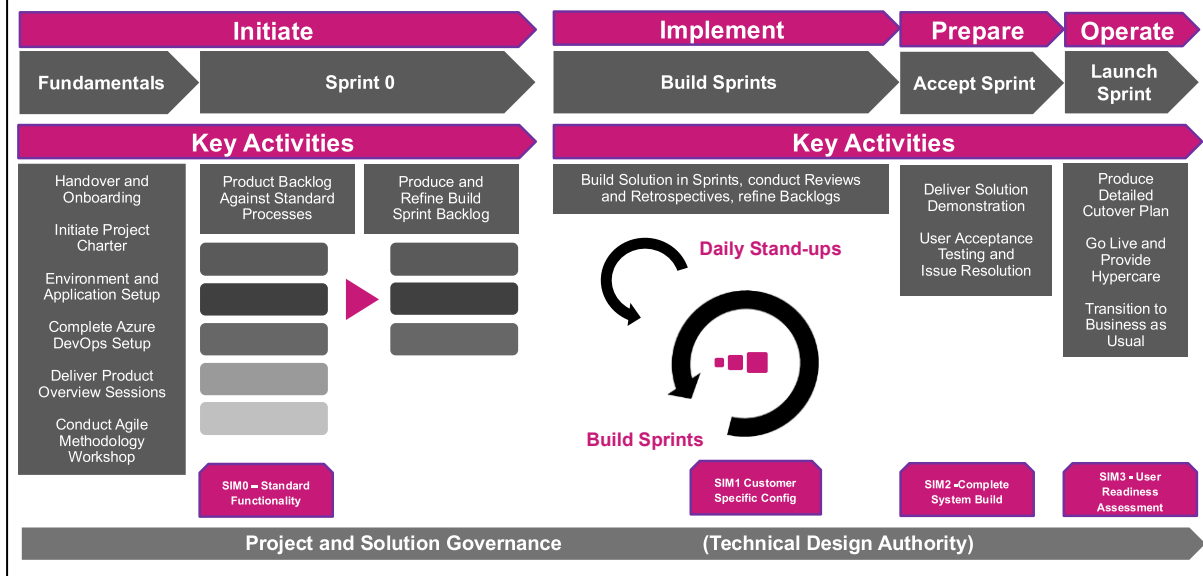
This complete system walk-through is led by the customer and used by Mphasis as an assessment as to how well the solution is owned by the customer through posing ‘what if’ scenarios for the Project Team to field.

Our accredited PRINCE2 Project Managers are experienced at using Sure Step Evolve to successfully implement Dynamics 365 for a wide range of global customers.

Our Project Management and Governance structures are robust and ensure implementations are well controlled, operate efficiently and remain focused on delivering maximum impact through the timely realisation of project key deliverables. Under this framework, our Dynamics Solution Architects and Functional Consultants deliver solutions adding significant value through their industry specific area expertise.

Mphasis can deliver projects using an Agile, Waterfall or Hybrid approach depending on scope and customer capabilities. Our Agile and Hybrid approaches are shown below.

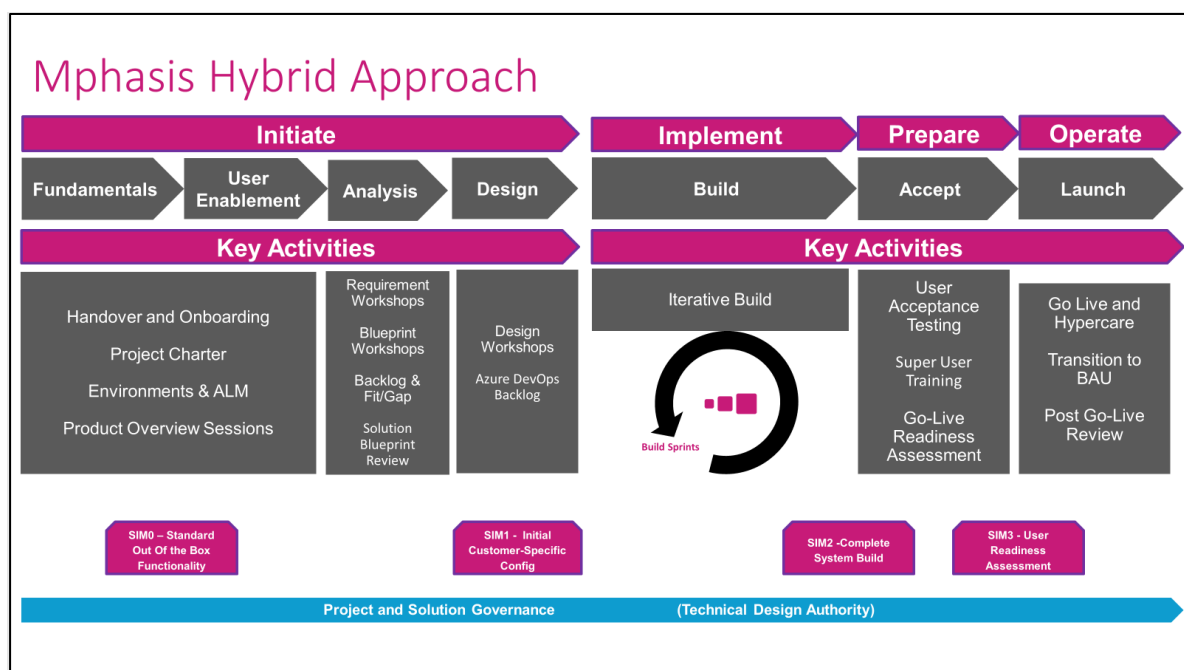
Mphasis D365 Agile Approach



All our approaches can facilitate the realisation of a **Minimal Viable Product (MVP) solution**; ensuring core functionality is delivered within specified timelines. Critical to this process is the Requirements Backlog, which is explained in more detail further below.

The definition and realisation of an MVP solution will be critical to ensuring we collectively deliver a Dynamics 365 solution by the desired Go Live date. Key decisions will need to be made through the Define Stage that will force only the adoption of the absolute 'must haves' into the Build scope.

A summary of the key phases and activities included with this approach is shown below:



The Initiate Stage provides the customer with a detailed description not only of their requirements but also of the solution that will be delivered, providing significant certainty

around cost, scope and capabilities of the solution that will eventually be put live. Define comprises of the following stage-gated phases:

Fundamentals

A range of activities are undertaken to ensure the tools, team and processes are set up ready for the project to commence. This includes installation and base set up of the product and Key Concept Overviews, covering the building blocks of the proposed technology and approach. Project Governance is confirmed, and the Project Charter initiated.

Survey and Setup

To accelerate the implementation process, the customer is surveyed, and in response, initial product configuration undertaken. This first round of requirements gathering workshops confirms where and how standard Dynamics functionality will meet customer requirements and culminates with SIM0. An initial iteration of the Requirements Backlog is published.

User Enablement

Intensive initial functional and technical training is given to the customer Core Project Team, covering all the elements in scope for the project. This typically includes Data Migration and System Administration training, as well as formal functional training for all in-scope processes. The goal is to empower the customer and upskill a number of Super Users across all functional and technical workstreams.

Detailed Design

Gaps identified in the earlier Survey and Setup phase are analysed to a greater level of detail through clarification workshops, with the outputs being recorded on an updated Requirements Backlog. Further configuration and set up of the system enable a SIM1 and confirmation of the delivery scope for the complete build. During the Detailed Design phase, Mphasis Consultants will identify any solution 'gaps' that can be met with a modification or ISV, providing the out-of-the-box solution would not be fit for purpose. Using the Requirements Backlog, Mphasis shows the customer any gaps and how the gap is going to be met. The Backlog is a core deliverable of the Define Stage and records customer requirements as uniquely numbered, prioritised user stories.

Each user story contains high-level design remarks, assumptions and risks and effort estimations. The Backlog can be MoSCoW rated and filtered to enable division of the requirements into an MVP (business critical functionality) solution as well as a potential set of future phases. The Requirements Backlog is critical in the Standard approach and MVP definition process. The Backlog ensures the full flow through of narrative and dialogue is recorded from the initial discussions, through the Define Stage right through to delivery of the solution.

The content is importable into Azure DevOps (our project management tool), thus becoming the working task list for the project team during the entire implementation. The Deliver Stage realises and accepts the solution architected and designed in Define in order that it can be moved through to Production and become the live operating system for the business users.

Deliver comprises of the following stage-gated phases:

Build

The solution build is undertaken according to the detailed design documentation and all final configuration activity on all in-scope modules is completed. Any confirmed modifications, interfaces and ISVs are built, tested and incorporated into the solution at this point. Project

team module and business process testing is completed, and the phase culminates with SIM2 before moving the solution through to acceptance and deployment activities.

Accept

The solution is reviewed, validated and formally accepted by the client through a series of User Acceptance Testing Cycles. Mphasis consultants are available throughout the testing process to resolve issues as they are raised, and the phase ends with SIM3 and the Customer Readiness

Assessment. At this point both the technology and customer Project Team are ready to initiate final cutover and Go Live activities.

Launch

Following customer-led End User Training, the cutover plan is activated, and a mock cutover executed and evaluated by the customer Project Team before progressing with the final Go Live to Production. During and in the immediate period after Go Live, Mphasis will provide onsite Hypercare to assist the customer Super Users triage any End User issues and help settle the business onto the new BAU processes.

Service Features and Benefits

Service Features

Microsoft Dynamics 365 (D365) provides an end-to-end solution for business transformation. It is made up of a suite of modern, intelligent applications to help organisations unify finance, treasury, expense management, projects, sales, procurement/purchasing, manufacturing, planning including DDMRP, demand forecasting, customer service, field service, case management, intelligent lead marketing, omni-channel, call-centre, and advanced business reporting on a single platform.

Many services utilise AI assistants by way of Microsoft Co-Pilots.

Service Benefits

1. **Better processes:** Introducing Dynamics 365 helps to streamline business processes which leads to increased efficiency and effectiveness.
2. **Automation:** Routine tasks can be automated, enabling Users to focus on high-value activities, this leads to cost savings and improved service delivery.
3. **AI Co-pilots:** User productivity is increased by the use of Industry leading AI.
4. **Public engagement:** Dynamics 365 offers members of the public multiple channels such as web, mobile, and social media, all of which enhance communication and transparency.
5. **User engagement:** Dynamics 365 with its familiar Microsoft interface is easy to learn, and quick to use both of which lead to higher user engagement.
6. **Less data entry:** Any data entered into Dynamics 365 updates immediately to every relevant module, meaning the data needs only entering once, is up-to-the-minute, accurate and can be trusted.
7. **Better data equals better reports:** More accurate and up-to-the-minute data provides the foundation for more insightful BI reporting.
8. **Customizable and Flexible:** Dynamics 365 is highly customisable to meet the ongoing needs of a public sector organisation ensuring value for money.
9. **Data integration:** Dynamics 365 can consolidate data from multiple disparate sources providing a unified view.

- 10. Security and Compliance:** With robust security features and compliance certifications, Dynamics 365 helps public sector organizations meet GDPR and other regulatory requirements, ensuring the confidentiality and integrity of data.
- 11. Scalability and Growth:** As a cloud-based solution, Dynamics 365 offers the scalability to support the growth and evolving needs of public sector organisations without significant infrastructure investments.

Overall, Microsoft Dynamics 365 provides public sector organizations with the tools and capabilities to deliver efficient, public-centric services while ensuring compliance, security, and adaptability to meet the demands of an ever-changing environment.



Further Information

For more information about our G-Cloud services, please contact our Public Sector Team at mphasisukps@mphasis.com.