Formus Pro

Microsoft Solutions Partner
Business Applications

Microsoft Solutions Partner
Digital & App Innovation
Azure

G-Cloud 15
Product Catalogue
Service Definition

Formus Learn
Formus Dev
Formus DX

Solution Overview

Cutting edge software is an important tool for any modern organisation, providing better consistency, accuracy, speed and efficiency to all aspects of operations, from marketing, case management, to logistics.

As a certified Microsoft Solutions Business Partner, we specialise in affordable configuration and development of user-friendly solutions built using the Microsoft Dynamics 365 (D365) and Microsoft Power Platform.

The systems we deliver sit confidently between bespoke and off-the-shelf options, keeping prices low but customisation high; something most providers say is impossible. The products we offer serve a broad spectrum of needs, supporting any aspect of the public sector.

But, perhaps more importantly, it's the system development, software, consultancy, training and support we offer that makes the difference between the software you can simply have installed and the software you can actually use.

Key Benefits Include

- Improved efficiencies – By streamlining data management, updating processes and reducing data entry requirements, Microsoft D365 can deliver a single version of the truth, reducing the risk of inaccuracies within an organisation and ensuring that data can easily be accessed.

- Flexible solution delivery – Microsoft D365 gives organisations the option to choose not only the implementation method but build that solution from selected applications.

- Cost-effectiveness – Microsoft D365 is licence driven, with monthly manageable pricing.

The solution is fully scalable by allowing you to add and remove licences as required.

The D365 Stack We Offer

Dynamics 365 is a set of intelligent business applications that helps you run your entire organisation and deliver greater results through predictive, AI-driven insights.

- AI Insights
- Sales (CRM)
- Marketing and Automation
- Customer Service
- Omnichannel
- Charity and Not for Profit (NFP)
- Finance and ERP
- Field Service
- Portals
- Power Platform

What is D365 For Sales?

Article: Dynamics 365 Customer Engagement - What Is It?

- Better understand end-user needs, engage more effectively, and hit more targets by using your own sales workflow. Streamline and even automate parts of the process.
- Start working collectively across departments with a 360-degree view of the end-user, their journey with you and their habits, whilst encouraging them to develop a deeper relationship with your organisation.
- Drive targets with pipeline analysis, deal insights, relationship analytics and conversation intelligence. Make informed decisions with data-driven feedback and take actions based on real-time data and emerging trends.
- See when and how end-users interact with their emails, so you can be more proactive and responsive in your communications. Keep relationships on track with signals from Dynamics 365 and Office 365 that reveal relationship health and risks.
- Improve conversions and targets with lead and opportunity scoring based on advanced scoring models to identify end-users most in need.
- Work more collaboratively with your marketing efforts and use data they help to collect to improve goals. Offering real-time, extensive reporting with an instant snapshot of your data.

D365 For Charities & NFPs

Improve donor relationships, handle, track and review budgets, manage events and control database activity whilst keeping everyone from donors to trustees up to date and connected.
Although some might mistake Microsoft D365 as being for big corporate businesses, in reality it's actually used in all kinds of organisations, including one of our specialty areas, the Third Sector.

We use Microsoft as the platform in the development of expandable, charity-focused systems for many organisations who previously thought their only choice was to be locked into "specialised" bespoke software. Working like this gives you the freedom and power to direct the set up and development of your system.

Dynamics 365 will connect Xero, Sage or QuickBooks, along with most payment providers such as Stripe and GoCardless.

When it comes to improving fundraising visibility or engagement through digital marketing, the inclusion of Click gives you vast options when considering marketing capabilities.

If you are familiar with MailChimp you will appreciate the ease and creativity the drag and drop email editor allows, and when you need something more the full HTML editor allows you the option to take full design control.

FormusPro Project Management Overview

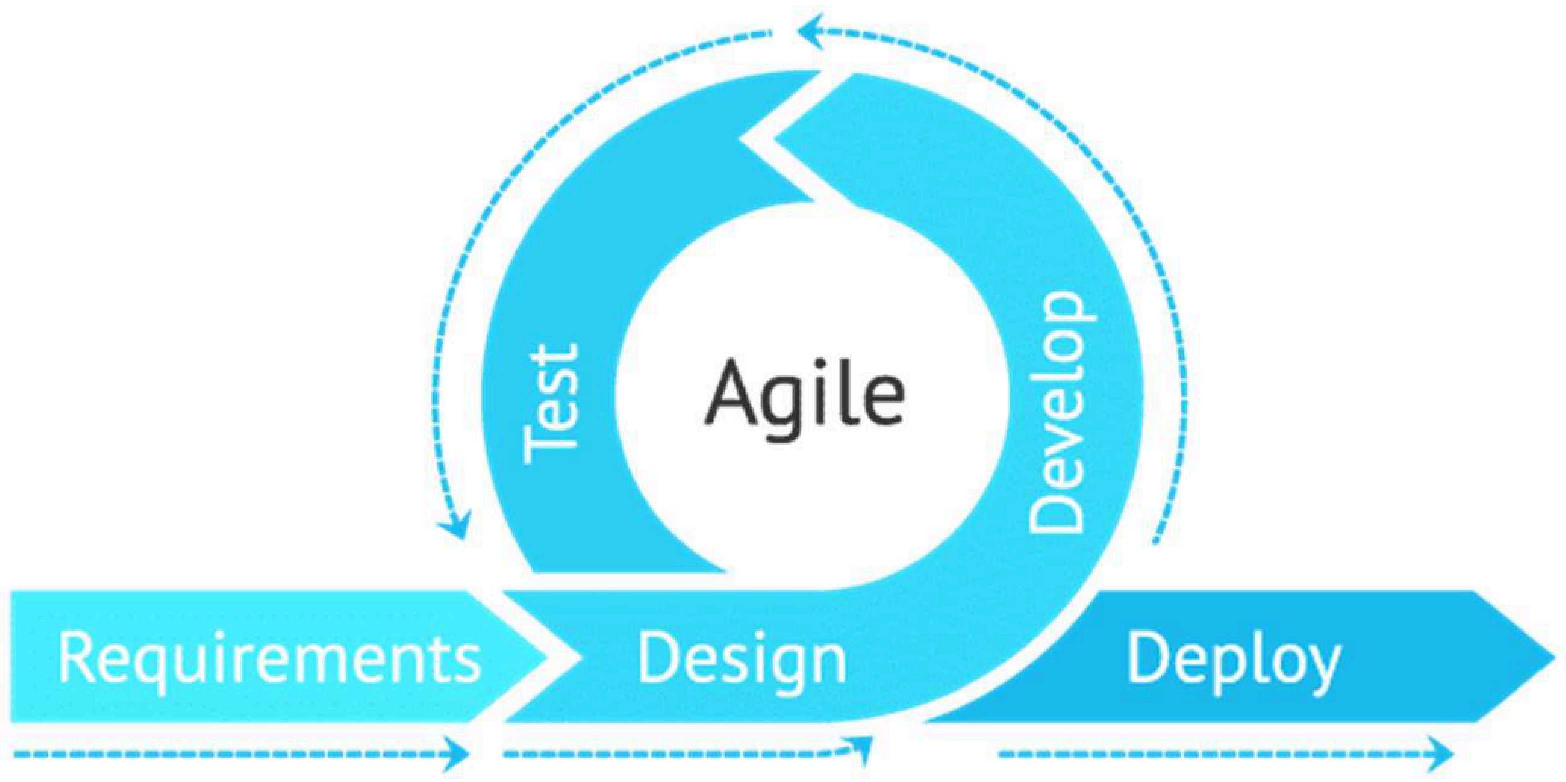
We adopt a hybrid approach to project management, using a mixture of Waterfall and Agile/SCRUM methodologies to continuously monitor all projects throughout their lifecycle.

- Governance Approach = **Waterfall**
- Delivery Approach = **Iteration**
  Define > Plan > Build > Test > Done > Retro
- Customer Involvement = **High**
  (Product Owner/Business Analyst/ SMEs)
- Development Model = **Evolutionary Delivery (CI)**
- Escalation Management = **Prompt**
- Project Risk Tolerance = **Low**
- Change Adaptability = **Quick**

FormusPro Project Management Delivery

Why We Use AGILE / SCRUM

- Product Backlog is client lead. Improving the clarity of requirements
- Encourages and rewards collaboration for the entire project team
- Fail early – de-risk product development and improve quality of work
- Adaptive and flexible to meet the product needs of the client
- Shippable products – early release, playback and adoption



FormusPro Project Management Governance

Why We Use Waterfall

- Provides clarity and clear engagement for steering groups whilst promoting understanding
- Clear visibility on overall project goals/ progress and budget
- Clearly defines milestones and deadlines to help align with the programme or portfolio

Typical Governance Meetings

- Weekly Project Management meetings
- Fortnightly playbacks to PO/ SME’s
- Monthly Steering with board
- Gateway touchpoints

FormusPro Project Management Delivery II

Typical Ceremonies

- Sprint Planning - OncePer Sprint (start)
- Backlog Refinement - Once Per Sprint (middle)
- Sprint Retro - Once Per Sprint (end)
- Sprint Playback - Once Per Sprint (post)
- Daily Stand-up - Daily

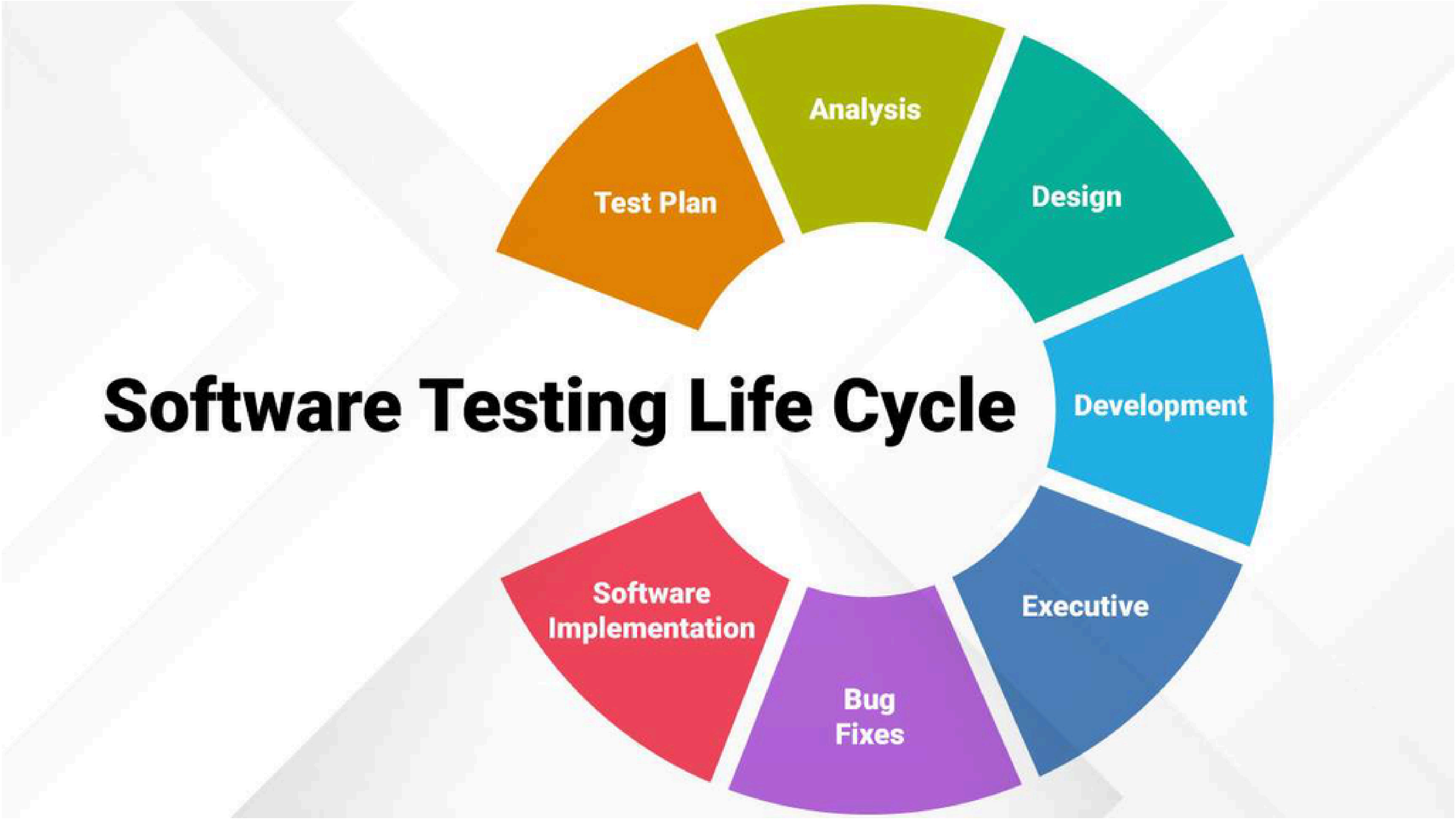
Direct Engagement

- **Definition of Ready (DoR)**
- **Definition of Done (DoD)** *Dev*
- **Definition of Done (DoD)** *Test*

Testing Strategy

During the test execution phase, the following test cycles will be undertaken:

- Unit testing (during Development)
- System testing (SIT if required)
- Regression testing
- Performance/ load testing
- User Acceptance Testing (UAT)



The number of test cycles, entry and exit criteria for each test cycle and the timelines for each cycle will be defined within the test strategy and approach document.

Testing Strategy - Continued

Development Quality Assurance

Change standards to enforce stronger unit tests into our coding:

- Broken code cannot be committed
- Code cannot be committed until built-in unit testing has been added, completed and passed
- Code reviews are enforced – Peer Review
- Separation of duties between developers and testers
- Weekly Lessons Learned meetings with our Principal Developer – Thomas Cunningham

Testing is completed in 3 distinct cycles:

- Unit Testing – During development by developer
- System Acceptance Testing – End of each Sprint - via separation of duties (peer review)
- Includes Regression Testing
- User Acceptance Testing – Post development after training has been delivered

Includes Regression Testing

Test Phase	Description
System Test	During the system test cycle FormusPro will test and evaluate the new functionality in line with the agreed test coverage to ensure the functionality works as expected and the business requirements have been met. Typically this focuses around the TDD. For the CRM application the functional testing will include functional system changes (configurable CRM / core CRM functions), data migration and system enhancements.
Regression Test	Regression testing takes place during SAT and UAT. FormusPro will undertake testing to ensure the existing system functionality works as expected and has not been impacted by the introduction of the new functionality.
User Acceptance Testing	During the user acceptance phase, TLC will be given the opportunity to evaluate the end-to- end business processes. This will be achieved by you coordinating the testing of a release with the relevant business area or by Formus Pro / you showcasing the test results.
Performance Testing	Where required, Performance testing will be undertaken to ensure that the system performs as expected and the response times have not been degraded as part of the introduction of the change.

Training Strategy

Training - *Official Microsoft Training Partner*

Ongoing training and familiarisation will have already taken place during the playback sessions however, once UAT sign off is received and any required changes are made or bugs resolved, we will look to begin user training.

There are different training approaches we employ:

- A “train-the-trainer” approach.
- Overview Training – documents or video
- Role Specific Training – Systems Administrator

Any of the remote training sessions can be recorded for future new employee training purposes.

Training can take place virtually, on-site or at our offices and Training/System. Documentation user guides will be provided.

The user guides are high level and focus on the framework of the system. They are designed so that the super users can tailor them to meet their own requirements or that of their teams.

Playbacks are typically 30 - 60 minutes at the end of each sprint.
Training sessions are typically 3 – 4 hours in length in an AM or PM slot

Additional

- Approx 2 days per week during dev phase
- Admin sessions for Systems Administrator.
- Additional Marketing Training
- Help creating marketing templates
- Optional – Microsoft Courseware and training for D365 certifications

Continuous Improvement

- Following go-live for additional items including further
- training and handholding

Our Approach

Our Approach

Discovery workshops and analysis of existing CRM and back-office systems to include but not limited to:

- Product and process fit gap analysis
- Portal and website features, Dynamics integration, payment integrations and user authentication – fit gap analysis
- Data Ownership, Privacy by design and Business Unit Hierarchy
- Security Role review. Identify Users/Teams roles and responsibilities
- Model driven app(s) to personalise user experience for job roles and responsibilities
- Data migrations and integrations of data to Dynamics 365
- Consent, Privacy Notice, Subscription management and Marketing preferences

Moving Forward

- Hypercare
- Support/Managed Services
- Business As Usual Development (BAU)
- Continuous Improvement

Coding & Methodology

Low-code

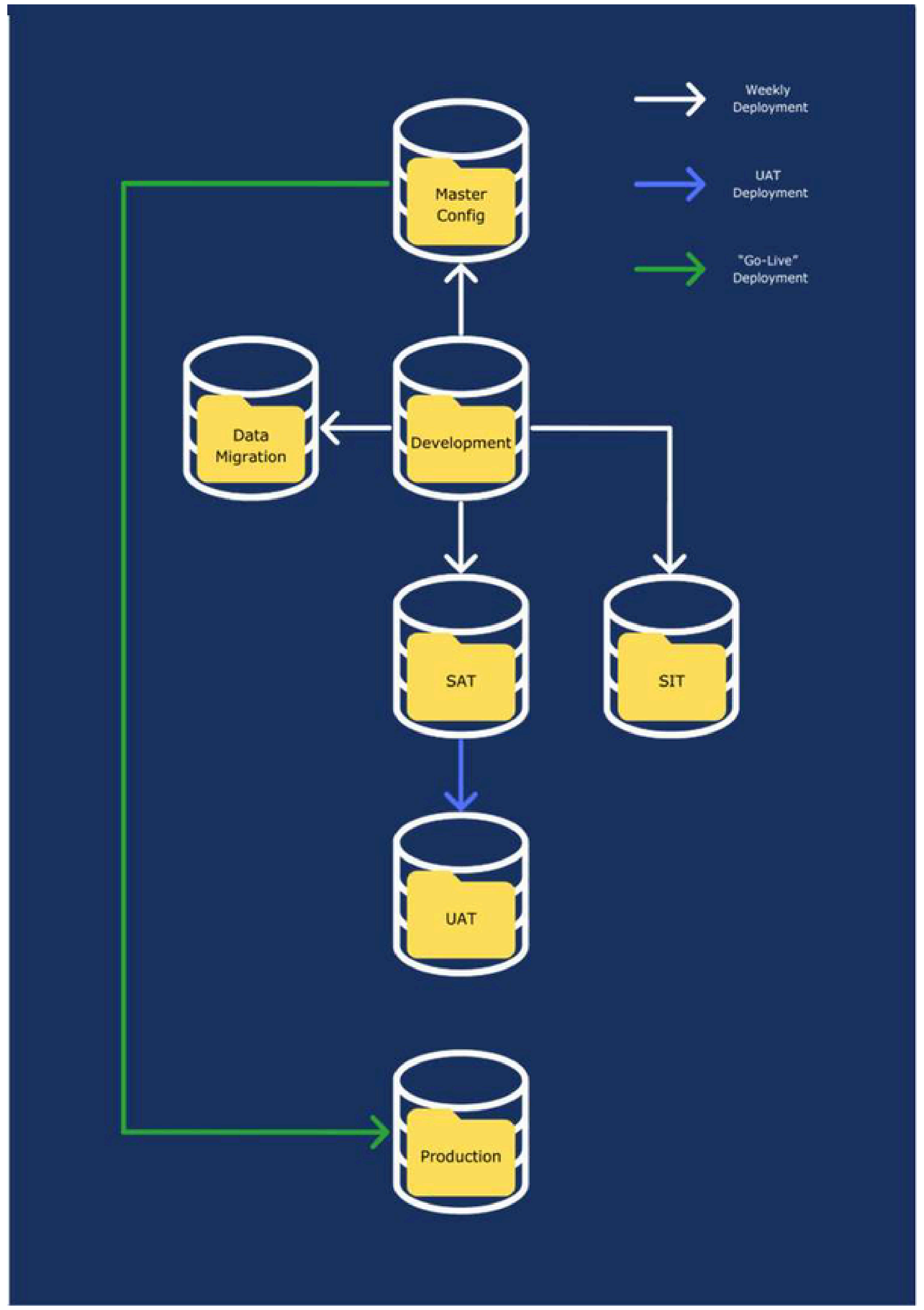
Allows professional developers to streamline & simplify. Producing work in a fraction of the time it takes with traditional methods.

No-Code

WYSIWYG “What You See is What You Get”. Build apps without coding.

Example: PowerApps

- A Dev Environment for each concurrent project
- SAT for Developer Testing
- UAT for User Testing
- SIT (if required)
- Data Migration (if required)
- Weekly or Bi-Weekly deployments to UAT during Implementation Phase
- Environments are now easy to create and decommission as required.



Live Projects Overview

Anthony Nolan
A very large D365 implementation for a Healthcare Charity saving the lives of people with Blood Cancer. FormusPro built a system (considered the core system for the business) used for a variety of processes within the charity including but not limited to Supporter/Donor management, Patient Management, Searching for matches, Testing and verification testing of Donor samples.

- Donor Recruitment
- Donation Facilitation
- Donation Follow-up
- Membership Management
- EMDIS & SSV

Youth Fed
Their key objectives were to increase the number of young people they support, increase the number of events that are run, more effectively record how the young people they assist progress (case management). Whilst improving management of engagement with donors and potential donors for the Fundraising Team, improve reporting across multiple channels and provision a single centralised system to help with the above

CDP
An extensive D365 implementation for a global charity. Based around the management of their sales and membership processes for disclosure.

The disclosing companies and their supply chain affiliates are managed through D365 and are controlled and visible via a complex hierarchy, facilitates the disclosure process and

- Company Membership
- Lead and Opportunity Process
- Fundraising and Engagement utilising the NFP accelerator
- Custom multi language PowerApps Portal
- Offline/Online Dynamics sync
- Role Based Access control implementation for Privacy By Design

Partnerships & Ongoing Delivery

Aftercare

- Hypercare (Go live support)
- Support/Managed Services
- Continuous Improvement
- Support with Microsoft updates release schedule (2 waves)

Hypercare

HyperCare provides tailored Go-Live on-going support services, so that there is a facility and process for issues and incidents to be managed in a 3rd line support capacity.

HyperCare provides dedicated resource(s) before, during and after Go Live.

- **Before Go Live** - Our dedicated resource(s) will work with your project team to ensure the solution is ready for deployment, all internal operational tasks are completed, provide support for any infrastructure requirements as well as any final training to users.
- **During the Go Live phase** - HyperCare means you have a direct contact for your project team during office hours. This direct line of communication means that any issues are picked up and dealt with immediately as well as providing support for your Super Users for any questions.
- **After Go Live** – Once the solution and end users have gone live, HyperCare continues to deliver direct 3rd line support to your business.

HyperCare provides peace of mind during the transitional phase, reducing the stress by providing direct, embedded resource that is readily available for when you need it.

Syetem Support Overview

We have three categories available from our support desk.

• Application (App) Support

• SME Customised System Support

• Enterprise Customised System Support

Our team on support are not your standard first line administrators. All of our support agents are approachable software specialists, with the ability to start troubleshooting and diagnosing your issues from first contact. Support covers CRM issues on functionality, configuration or customisation depending on service level agreement. For example, adding or renaming fields, setting up basic reports or alerting us to any bugs or business critical issues to fix. All Formus Professional Software support packages allow you access to our developers' own Knowledge Base. You can tap into high level FAQs and troubleshooting solutions directly online, at any time.

Overview:

We offer varying levels of support, up to and including full 24/7 365 support. We offer 1 hour response as a minimum on all of our support packages . Support is provided by us, based in our UK office and by people who will know your system as they will help develop it before supporting it

Formus Pro Support Portal:

A place for your super users to raise any issues. We also offer telephone support

Knowledge base:

Available to all Support clients to find existing solutions to your issues where possible.

Application (App) Support

This option is for clients who have one of our FormusPro Applications (apps).

Formus Pro Apps are our tailored software packages. Software specially made for specific departments or industries, all usable out of the box but further customisable to fit your individual business though configuration. Configuration avoids the need for changes to the fundamental code (development or backend customisation) and is easier to apply, maintain and support, therefore we offer unlimited help desk support during office hours for all Formus Pro Apps.

Support at this level is focused on troubleshooting the use of the system. User training is available on all our systems so you should have a good head start but when things come up or new starters arrive our support team can answer any user questions you might have.
System change requests are not included in app support as our app systems are designed to be customised and not redesigned. However, should there be a bug or you desire a change that goes beyond the standard parameters of the system, we offer the option to upgrade or review on a case-by-case basis.

Support is offered over the phone or via online client-specific portals. Queries are raised as support tickets online through a passwordprotected support portal created for your company.
Here you can set your preferences, log your issues and access your own client-specific CRM Knowledge Base.

SME Customised System Support

Our SME support covers a more complex set of criteria to suit systems that have been developed beyond our standard Formus Pro App systems. Backend customisation (development) is used to tailor these more sophisticated systems therefore support for these SME systems is also more tailored to you.

Examples of systems requiring such support would include those with third party integrations, plug-ins, or more complex process flows. This level of support allows all users to raise queries with our help desk, including requests for bug fixes, or help with basic customisations. Due to the complex nature of customised systems, this option allows for 5 hours of help desk support per calendar month.

Support covers CRM user queries on app functionality or basic front-end configuration with an initial response time of 30 minutes. This means your ticket will be picked up, acknowledged and prioritised within 30 minutes of it being submitted.

Support is offered over the phone or via online client-specific portals. Queries are raised as support tickets online through a password protected support portal created for your company.

Here you can set your preferences, log your issues and access your own client-specific CRM Knowledge Base.

Enterprise Customised System Support

Our Enterprise systems are developed to do more than any off the shelf CRM software. They are built to provide the most complex and sophisticated setups, therefore justify the highest levels of care and support. Mission critical, business essential systems are at the of heart of operational success. Many businesses choose this level of support because it offers extra hands-on deck, access to our senior architects and regular contact should it be required.

Enterprise level support offers the highest peace of mind and the most flexibility. This option is suitable for any clients with wide scale customisations to their system. This could include advanced front end configuration changes, back-end development, or integrations with existing systems. For example, if you have had any bespoke development carried out, or if you link your system with 3rd-party systems such as MailChimp or Xero, this support package would be suitable for you.

Advanced back-end customisations such as plug-ins, function apps, and custom workflows are all covered by Enterprise Custom System Support. What's more, we can also provide support for your Azure environment.

Training packages are also available to help your users find their way around the system. Support is offered over the phone or via online client-specific portals, and is available to all your staff, from end-users to developers. If escalation is required for the more complex cases, you will also have access to our senior architects. Queries are raised as support tickets online through a password-protected support portal created for your company.
We will hold regular progress meetings with you, and the more complex tickets will be escalated to our senior architects for review.

Continuous Improvment (CI)

No organisation wants to be locked into a system that can’t grow and flex.

We know the importance of a system that you feel empowered by, that saves you time and effort and can be built upon or improved over time. We know that you don’t want to have to go through the whole process again, so we put together our Microsoft Dynamics 365
Continuous Improvement (CI) Packages to help keep you and your system working to best practice.

Our Microsoft Dynamics 365 Continuous Improvement Packages were created to support just that; the improvement of your business through your system, as and when you change your strategies. Avoid the large chunks of time and money on “big project” style work by moving in manageable steps, to reflect your own natural progression.
We advise at least once a month in the early stages after a new deployment and once a quarter after that. However, it's up to you. You choose how often you review and improve. Ask about our discounts for those who would like more than one consultancy day a month. We have 3 different CI options to choose from, all for streamlining and adapting your system. Tier 1, 2 & 3 each building on the previous tier and expanding your access to our top level developers for more complex requirements.

All Continuous Improvement packages support:

- Changing, adding or updating additional CRM fields, views, reports and dashboards
- Improving & supporting your team's user adoption and productivity
- Allowing for the growth of the company to dictate the improvement of existing D365 systems
- Implementing changes in your own time, outside a single deployment project timeline

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Thank you from the team at

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