

Microsoft Dynamics 365 Customer Engagement & Marketing Platform — Lot 2b Product Definition / Service Definition

1) Service Overview

Service name: Microsoft Dynamics 365 Customer Engagement and Marketing Platform

Lot: 2b – Software as a Service (SaaS)

Service description (summary): This service enables public-sector organisations to manage advertising, marketing campaigns, digital commerce, customer service, sales productivity, and contact-centre operations using Microsoft Dynamics 365, Power BI, Fabric, Copilot, and supporting AI-driven tools. It provides real-time marketing journeys, omnichannel contact centre operations, analytics, and automation features that help optimise customer engagement, measure campaign effectiveness, streamline commerce, and improve service responsiveness.

Cloud deployment: Public cloud and Hybrid cloud

Supplier role: Reseller providing extra support (organisation resold: Microsoft)

2) Service Categories (Lot 2b taxonomy)

This service maps to the following Digital Marketplace categories and aligns to the submitted catalogue listing:

- **Advertising**
 - Advertising Placement
 - Advertising Measurement
- **Marketing campaign management**
- **Digital commerce**
- **Sales force productivity and management**
- **Customer service**
- **Contact centre**

3) Service Features & Benefits

Features:

- Advertising placement management using Dynamics 365 Customer Insights and partner adtech.
- Advertising measurement and reporting using Power BI and Microsoft Fabric.
- Real-time marketing campaign management with Dynamics 365 Customer Insights Journeys.
- Workflow automation and integration using Power Automate for campaign processes.
- Digital commerce management via Dynamics 365 Commerce modules.
- Sales productivity, forecasting and analytics using Dynamics 365 Sales and Sales Copilot.
- Customer service operations via Dynamics 365 Customer Service and Omnichannel capabilities.
- Contact centre workflows using Dynamics 365 Contact Center and Azure AI tools.
- Role-based dashboards, analytics and AI-driven insights.
- API integrations with third-party adtech, marketing and commerce platforms.

Benefits:

- Optimise advertising placement across channels to reach target audiences efficiently.
- Measure campaign effectiveness through real-time analytics and visual reporting.
- Automate marketing processes to reduce manual effort and operational delay.
- Enhance sales productivity using AI-based insights and guided recommendations.
- Improve customer service responsiveness through integrated omnichannel tools.
- Streamline digital commerce operations for more efficient transactions.
- Gain actionable insights across marketing, sales and service operations.
- Support cross-team collaboration through integrated Microsoft cloud platforms.
- Maintain secure, role-based access to customer data.

4) Scope, Add-ons & Extensions

- **Software add-on or extension:** Yes (also available as a standalone SaaS service).
- **Extends:** Microsoft Dynamics 365, Power Platform, Azure AI services.

- **Multi-cloud support:** Yes.
- Optional extensions may include advanced partner adtech modules, additional analytics connectors, or extended support packages.

5) How Users Work With the Service

- **Interface:** Cloud-based, web-accessible interface for marketing, sales, customer service and commerce teams.
- **Browsers:** Edge, Chrome, Firefox, Safari (latest versions).
- **Install requirements:** No installation required.
- **Mobile support:** Mobile-responsive interface suitable for approvals, monitoring and workflow updates.
- **Service interface:** Dynamics 365 modules, Power Platform apps, SharePoint integration and API connectors.
- **Accessibility:** WCAG 2.2 AA compliant.
- **Customisation:** Not offered as part of standard service.
- **API:** Not available as a direct feature; integrations supported through underlying Microsoft tools.

6) Technical Requirements & Dependencies

- Microsoft 365 tenant with appropriate Dynamics 365 licences.
- Supported browsers (Edge, Chrome, Safari, Firefox).
- Stable internet connectivity for real-time operations.
- Windows 10/11 or macOS 10.15+ recommended.
- Microsoft Entra ID accounts for authentication.
- Relevant partner adtech or marketing platform licences.
- Endpoint security aligned to organisational policies.

Service constraints:

- Dependent on Microsoft 365, Dynamics 365 and Azure service availability.
- Some modules require specific licences.
- Planned maintenance windows may affect access.
- Mobile functionality may vary.
- Support limited to Microsoft-supported platforms.

7) Onboarding & Offboarding

Onboarding:

- Structured onboarding programme including initial configuration, workflow alignment and module-specific setup.
- Documentation, quick-start guides, dashboards and reporting templates provided.
- Optional onsite or instructor-led training.

Documentation: Provided in PDF, WCAG 2.2 AA compliant.

End-of-contract data extraction:

- Data export via Microsoft 365, Dynamics 365 and Azure tools.
- Reports/export formats: Excel, CSV, PDF, JSON, XML.
- Large dataset migrations supported through Azure Data Factory or Synapse.

End-of-contract process:

- Defined offboarding with secure decommissioning.
- Standard support included; extended services available.

8) Metrics, Reporting & Tagging

Service metrics include:

- Campaign performance, reach, conversion and user activity.
- Sales pipeline health and forecasting analytics.
- Customer service resolution times and case performance.
- Contact centre efficiency and service levels.
- System uptime and operational metrics.

Reporting: Regular and on-request reports.

Resource tagging: Supported, including FOCUS tagging.

9) Support Model

- **Support channels:** Email/ticketing, phone support, optional web chat.

- **Hours:** 09:00–17:00 UK time, Mon–Fri.
- **WCAG 2.2 AA compliant** support interfaces.
- **Onsite support:** Available at extra cost.
- **Support tiers:** Tier 1 triage → Tier 2 technical → Tier 3 specialist → Tier 4 Microsoft vendor liaison.
- Third-party support available.

10) Security, Governance & Compliance

- **Data-in-transit:** TLS 1.2+, IPsec or TLS VPN gateway.
- **Data storage/processing:** UK, EEA, or other Microsoft-supported regions with customer control options.
- **Penetration testing:** Performed at least every 6 months.
- **Data sanitisation:** Cryptographic erasure, secure overwrite, or physical destruction.
- **Equipment disposal:** Third-party destruction services.
- **Governance:** Cyber Essentials Plus; Information Security Management aligned to ISO 27001 principles.
- **Operational security:** Configuration/change management, vulnerability management, protective monitoring and incident response.
- **Access control:** RBAC, MFA, least privilege, secure authentication methods.
- **Post-quantum cryptography:** Supported.

11) Service Levels, Availability & Resilience

Availability:

- Delivered via Microsoft 365 cloud with >99.9% uptime backed by Microsoft SLAs.
- Service credits apply per Microsoft SLA policy.

Resilience:

- Global, multi-datacentre architecture with redundancy, failover and continuous monitoring.
- Independently audited: ISO 27001, SOC 1/2, CSA CCM.

Outage reporting:

- Microsoft 365 Service Health Dashboard and Microsoft Status site.

- Reseller provides incident monitoring and escalation.

12) Public-Sector Considerations

- Multi-tenant isolation ensures no cross-customer performance impact.
- Capacity and scaling fully handled by Microsoft.
- No PSN connectivity required.

13) Pricing Summary (high-level)

- Per-user/per-device/per-tenant licensing model.
- Monthly or annual billing options.
- Pricing determined via list price minus Framework Discount.
- Category mapping aligns with Lot 2b Pricing Schedule.

14) Training & Documentation

- WCAG 2.2 AA PDF documentation.
- Optional onboarding and role-based training.
- Examples include user workshops, admin sessions and webinars.

15) Trials & Education Discounts

- Free 30-day Microsoft trials available for eligible modules.
- Education discounts available per Microsoft programme eligibility.

16) Responsibilities Matrix (Supplier vs Buyer)

Supplier responsibilities:

- Provide licensing, configuration guidance, operational support, reporting and analytics.
- Manage incident escalation and support.

Buyer responsibilities:

- Maintain Microsoft 365 tenant and assign correct licences.
- Define access policies, ensure user provisioning and enforce MFA.
- Manage data retention, exports and compliance settings.

Platform operation: Microsoft hosts and operates the SaaS platform; supplier does not host data.

17) Compliance with Lot 2b Product Definition Spec

This document provides all required Lot 2b Service Definition elements, including service overview, scope, features, technical requirements, support model, onboarding/offboarding, security, availability, pricing, accessibility, and roles/responsibilities, fully aligned with the G-Cloud 15 Lot 2b specification.