

Dynamics 365 Consultancy Services – Delta Technology Services

Service Overview

Delta Technology Services provides expert Microsoft Dynamics 365 consultancy, helping organisations design, implement, and enhance modern cloud CRM and case-management solutions. Our consultants combine deep technical knowledge of Dynamics 365 Customer Engagement apps with strong business analysis capabilities, enabling customers to streamline customer interactions, automate processes, and build scalable service models.

We specialise in Dynamics 365 solution design, Dataverse customisation, plugin development, JavaScript enhancements, Power Automate workflow engineering. With extensive experience across Sales, Customer Service, Field Service, and custom industry solutions, we help organisations transform legacy systems, improve data quality, and deliver better user experiences.

Delta is recognised for providing clean, well-architected Dynamics 365 solutions, ensuring organisations gain long-term value, reduced technical debt, and a CRM platform that supports continuous improvement, compliance, and organisational growth.

Scope of Service

Our Dynamics 365 consultancy includes:

Solution Architecture & Process Design

- CRM process design (Sales, Service, Marketing, Field Service)
- Customer journeys & case management workflow optimisation
- Security model design (teams, roles, hierarchy-based access)
- Environment and solution governance

Customisation & Extension

- Dataverse table/entity modelling
- Business rules, forms, views, model-driven app design
- C# plugin development & custom workflow activities
- JavaScript (TypeScript) UI enhancements
- Ribbon, command bar, and Power Fx customisations

Integration Engineering

- Azure Functions, Logic Apps, API integrations
- Legacy system integration & data synchronisation
- Real-time and batch integrations with ERP, HR, or third-party platforms

Automation & AI

- Power Automate cloud flows
- Viva Sales / Copilot integration
- Customer Service AI capabilities (knowledge search, intent detection)

Data Migration & Quality

- Import templates, staging processes, transformation mapping
- Migration

Roles & Responsibilities

Delta Technology Services Responsibilities

- Provide certified Dynamics 365 Solution Architects, Functional Consultants, and Developers
- Lead discovery, analysis, solution design, and technical delivery
- Develop secure, scalable customisations following Microsoft best practices
- Produce specifications, documentation, and configuration guides
- Conduct testing, QA, and provide expert recommendations

Customer Responsibilities

- Provide SMEs for processes such as sales, service, and operations
- Supply access to environments, accounts, and relevant data
- Participate in validation sessions, UAT, and decision making
- Approve changes and manage internal business readiness

Security and Compliance

Our consultancy aligns with Microsoft cloud security standards and public-sector expectations:

- Role-based access controls and least-privilege permissions
- Multi-environment governance (dev/test/production)
- Secure code practices for C# plugins and integrations
- Compliance with Microsoft Dataverse security, auditing, and GDPR controls
- Encryption-in-transit and in-rest (native to the platform)
- Strict separation of customer data and consultant access

Onboarding & Offboarding

Onboarding

- Discovery workshops with business and technical stakeholders

- CRM process review: lead-to-opportunity, case management, service operations
- Review of existing environments, solutions, integrations, and data
- Establishment of solution architecture, ALM strategy, and delivery roadmap

Offboarding

- Delivery of solution documentation, data models, and custom code
- Knowledge-transfer for admins, developers, and product owners
- Handover of solution layers and governance artifacts
- Recommendations for roadmap, optimisation opportunities, and next phases