



Clarity drives  
success

# Microsoft AI Business Applications Consulting and Implementation

Service Definition

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## 1. Our Proposition

Flici Insights helps organisations modernise customer operations with secure, AI-enabled Dynamics 365 and Power Platform solutions. Our delivery philosophy is simple: go live fast, stay fit-to-standard, and scale with confidence. We combine Microsoft's Success by Design governance with agile delivery and Azure DevOps discipline to reduce risk, contain complexity and deliver measurable improvements across service, engagement and operational efficiency.

## 2. Service Overview

We provide full-lifecycle implementation and advisory services across Dynamics 365 CRM and Power Platform solutions. Engagements span discovery, solution design, configuration, data migration, integrations, testing, deployment, and go-live, followed by optimisation and roadmap guidance.

Nexus is available as a standalone advisory service or as a precursor to implementation. It shapes vision, value and scope before build, ensuring the programme targets the highest-impact outcomes.

Where relevant, our work aligns with Microsoft Industry Accelerators (Government, Nonprofit, FSI, Housing) to reduce time-to-value.

## 3. What we deliver

Our work begins with structured discovery to clarify desired outcomes, scope and constraints. We then design a process-led solution aligned tightly to out-of-the-box capabilities. Delivery is iterative, transparent and demonstration-based to ensure alignment and early validation. Data migration is planned early and executed through proven mapping, cleansing and rehearsal cycles. Integrations use Microsoft cloud services and standard connectors to ensure resilience. Adoption is built in through targeted training, change guidance and clear role-based support.

### Typical deliverables

- Solution blueprint, high-level architecture and configuration catalogue
- Data migration plan, mappings, quality checks and rehearsal results
- Integration architecture and interface catalogue
- Test strategy, scripts and acceptance evidence
- Cutover plan, support model and operational runbook
- Adoption materials including role-based guides, comms and training assets.

## 4. Delivery Approach

We blend Microsoft Success by Design quality gates with agile sprint execution. We work through a backlog with a definition-of-done and automated deployment pipelines to maintain discipline and avoid technical debt. Fit-to-standard is the default approach; customisation is introduced only when justified by clear, measurable value. Environment strategy, ALM, performance and security are addressed from the outset, so the solution is robust and supportable.

### Governance checkpoints

- **Initiation:** programme setup, environment and tenant strategy
- **Design:** process alignment, architecture, security and data reviews
- **Build/Test:** performance validation, test readiness and deployment readiness
- **Operate:** go-live readiness and handover to steady state

## 5. Data, integration and AI

We use a repeatable data migration framework that covers assessment, profiling, mapping, cleansing, trial loads, and validation. Integration patterns use Dataverse APIs, Power Platform connectors, and Azure services to avoid fragile bespoke code. Where beneficial, we introduce AI capabilities such as Copilot, natural language automation, and real-time personalisation to enhance decision-making, customer journeys, and case resolution, always governed by appropriate controls.

### Common patterns

- CDP data unification, consent management and segment activation
- Journey orchestration with real-time triggers for targeted engagement
- Omnichannel case management and knowledge-driven service
- Work order, scheduling, mobile productivity, and first-time-fix optimisation
- Sales pipeline management, guided selling and forecasting improvements
- Low-code apps to digitise forms, automate workflows and streamline internal processes

## 6. Adoption and Change

Adoption is treated as a core workstream with scenario-based training, targeted comms and role-based enablement.

We enable organisations to establish a Power Platform Centre of Excellence (CoE) using Microsoft's CoE Starter Kit, implementing:

- Audit & governance dashboards
- Maker enablement & onboarding processes
- Application lifecycle governance
- Best-practice DLP, security and environment strategies

Governance includes Steering, User, and Technical Groups, with clear decision paths and a cadence aligned with roadmap priorities.

## 7. Security, accessibility and compliance

Delivery is performed within Microsoft's secure cloud with least-privilege, role-based access. Staff screening follows BPSS. All documents are supplied in accessible PDF/A format. Implemented solutions follow Microsoft accessibility standards and public-sector requirements and align with UK data protection and governance expectations.

## 8. Onboarding and offboarding

Onboarding includes kick-off, environment and DevOps setup, access provisioning, and a jointly agreed discovery plan. Offboarding includes documentation handover, configuration records, runbooks, knowledge transfer and secure access removal. A transition to a chargeable support service is available if required.

## 9. Outcomes and KPIs

We measure success against jointly agreed metrics such as:

- Time-to-go-live and scope confidence
- User adoption and satisfaction by role/team
- Case resolution times, SLA adherence, first-contact resolution
- Campaign engagement, segment activation and conversion
- Sales cycle length, forecasting accuracy and win ratios
- Field first-time fix rate and scheduling efficiency
- Reduction in customisations and overall cost of ownership
- Governance cadence adherence and decision-throughput

## 10. Previous experience

Our team has delivered Dynamics 365 and Power Platform solutions across multiple public-sector and regulated environments, including:

- **Housing and community services:** case management, complaints handling, repairs orchestration and resident engagement.
- **Higher education:** enquiry-to-admission journeys, student engagement and CRM uplift.
- **Regulated services:** complex customer service operations, scheduling and performance-based field activities.
- **Professional services organisations:** sales pipeline management, forecasting, and relationship management transformation.

## 11. Engagement packages

### 1) Transform

Nexus advisory package that accelerates the first-step transformation. Through the Inspire, Design, and Achieve phases, we align business goals with technology capabilities, develop a value-driven roadmap, and prepare for delivery, ensuring the right scope moves first.

## 2) Implement

Sprint-based implementation of priority workloads with configuration, data migration, integrations, testing and go-live support. Quality gates and fit-to-standard principles keep the solution maintainable and scalable.

## 3) Adopt

A governance-led adoption service featuring Steering, User and Technical groups, defined decision routes, and a cadence aligned to roadmap milestones. Includes backlog management, change management and product evolution to sustain outcomes.

These models can be used individually or combined; Transform and Adopt are available standalone or as add-ons to implementation.

## 12. Commercial

Commercial models include fixed-scope packages, sprint-based delivery, and time-and-materials. Pricing reflects complexity, workloads, data volumes, integration requirements and organisational readiness. Optional add-ons include change management, adoption services and extended training. Nexus advisory can be procured separately or bundled with implementation, and Adoption can follow immediately after go-live or run in parallel for large programmes.

## 13. Why us

We combine hands-on public-sector implementation expertise, a pragmatic low-code approach, and strict alignment with Microsoft best practices. Our designs emphasise maintainability, clarity and traceability so that value arrives early and builds over time. The outcome is a modern CRM platform that delivers measurable improvements and can be confidently extended as needs evolve.