



Microsoft Power Platform and Dynamics 365 Customer Engagement Implementation & Support Services



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About Venture

Who We Are: Your Strategic Partners in Transformation

We are committed to being more than a service provider; we are a strategic partner dedicated to driving meaningful, sustainable change. Our approach combines deep technical expertise in Microsoft Dynamics 365 and other core solutions with strategic insight, change management, and business design capabilities. We understand that technology should be a value driver for your organisation, and we align our efforts to support your growth and transformation objectives.

Industry Expertise

Extensive experience delivering transformation across different industries



Client Success Focus

Building long-term relationships that deliver measurable value



R I S E Methodology

A proven framework designed to align technology with business goals



Our Approach: A True Partnership

We believe that the first step in becoming a strategic partner is to develop a deep understanding of a client's business, industry, and unique challenges. This means starting with a fresh perspective and engaging closely with your teams to understand your strategic goals, operational dynamics, and the specific complexities of running a purpose led facilities management business. By immersing ourselves in your vision, we can provide tailored advice and solutions that not only meet your functional needs but also drive meaningful and measurable business outcomes. Our approach is characterised by proactive communication, transparency, and a commitment to your success.

From the outset, we foster open dialogue through regular workshops, feedback sessions, and collaborative problem-solving. These practices ensure alignment, build trust, and create a foundation for a strong, long-term relationship. This partnership extends beyond the implementation phase. We aim to become a trusted advisor and virtual extension of your organisation, supporting your journey toward operational excellence and digital transformation. By leveraging our expertise and the RISE Methodology, we position ourselves as a key contributor to your efforts to modernise your finance and operational systems, streamline processes, and achieve your growth ambitions.



About Venture

Proven Capabilities in Business Design and Change Management

Venture's track record includes leading significant transformation projects that go beyond functional delivery, addressing complex business challenges with a focus on strategic outcomes. For example, we partnered with Biffa, one of the UK's leading waste management companies, to deliver one of the largest Microsoft digital transformations in Europe. This comprehensive initiative included a Finance and Procurement transformation, showcasing our ability to manage highly complex projects and deliver impactful results at scale.

Our RISE Methodology emphasises stakeholder engagement, modern training techniques, and a structured approach to managing complex change. We tailor these practices to align with your operations, ensuring every stage of the transformation supports your strategic goals. By working closely with your teams, we ensure our solutions are not only technically robust but also designed to deliver measurable business value.

With a hands-on approach to business design and process transformation, Venture is well-equipped to guide you through this critical digital transformation journey, enabling operational excellence and sustainable growth.



Venture's capabilities span the entire Microsoft stack



RISE Methodology



Venture's methodology is designed to de-risk digital transformation projects, ensuring they deliver measurable value and lasting impact.

Built on our proprietary RISE Methodology, it integrates strategic insights, innovative tools, and adaptive delivery practices to address every phase of your transformation.



Comprehensive Framework

RISE (Review, Innovate, Streamline, Engage) ensures alignment with business goals, tailored solutions, and iterative delivery for continuous value.



User-Centric Approach

By integrating tools like Gyde365, we prioritise user adoption, equipping your teams to confidently embrace new systems and processes.



Adaptive Delivery

Iterative design, build, and test cycles keep stakeholders engaged and ensure the final solution aligns with our clients' objectives.



End-to-End Support

From strategic planning to post-go-live optimisation, our methodology ensures that technology serves as an enabler of operational excellence and long-term growth.

By combining structure, flexibility, and innovation, our methodology empowers clients to achieve transformative outcomes while minimising risk and maximising value.



RISE Methodology

Aligning strategy, innovation and execution to deliver impact



Review

Uncovering your
business needs

Strategic insights for a
strong foundation



Innovate

Designing tailored
solutions

Customised roadmaps
driving measurable value



Streamline

Delivering efficiency
and iteratively

Agile processes for quick
wins and flexibility

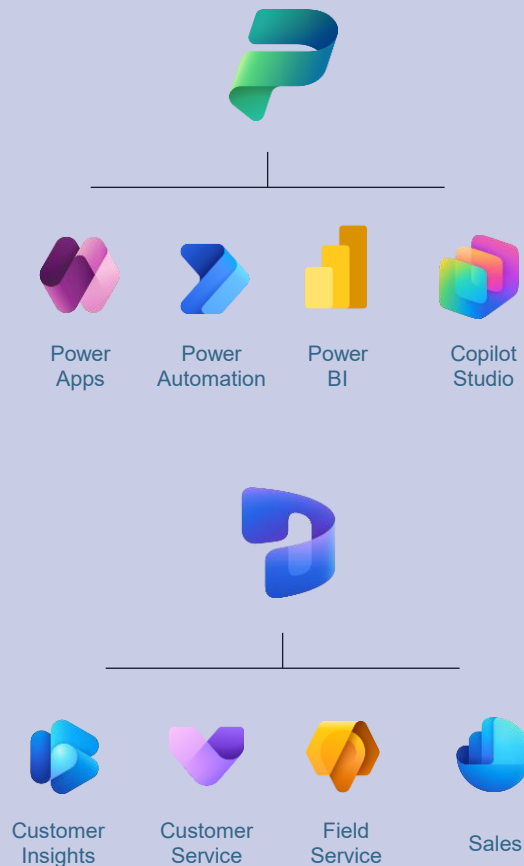


Engage

Ensuring user
adoption and success

Change management
for lasting impact

Microsoft Power Platform and Dynamics 365 Customer Engagement



Microsoft Power Platform is Microsoft's low-code/no-code application and automation stack (Power Apps, Power Automate, Power BI, Copilot Studio and related services) that empowers both developers and business users to build apps, automate processes and surface analytics without heavy custom development. Built on Microsoft Dataverse and tightly integrated with Azure and the Dynamics 365 family, Power Platform enables rapid creation of role-based apps, robust workflow automation, self-service and embedded analytics, and secure externally-facing portals, all while remaining enterprise-grade and governable.

Venture's practice treats Power Platform as the enabler for faster time-to-value: we use it to deliver in-app guidance, tailored Power Apps, automated flows and Power BI reporting that extend Dynamics 365 solutions and unlock business insights quickly.

Dynamics 365 Customer Engagement is Microsoft's suite for managing customer-facing activities, typically delivered as Sales, Customer Service, Field Service, Marketing and Portals. It creates a single, trusted view of customers and their interactions. Dynamics 365 Customer Engagement provides out-of-the-box capabilities for lead/opportunity and pipeline management, case and SLA management, field scheduling and mobile execution, marketer segmentation/automation, and secure customer portals; it also embeds AI features and integrates with ERP systems, Power Platform analytics and enterprise integration layers to provide end-to-end customer workflows.

In practice, organisations use Dynamics 365 Customer Engagement to standardise sales and service processes, improve first-time fix and response times, automate routine work, and bring customer data into unified dashboards so teams make faster, more informed decisions.



RISE Project Delivery Stages

Mobilise

Mobilise establishes the programme foundation: appointing sponsors and governance, confirming scope, finalising the project plan, resourcing the team and setting up delivery tools and environments. Early discovery activities, risk and communications plans, and a formal kick-off are completed to ensure everyone is aligned and ready to proceed.

Design

The Design phase translates business needs into a detailed solution: process mapping, requirements workshops, solution and technical architecture, security and data designs, and a detailed cutover and testing strategy. Decisions about configuration versus customisation, integration patterns and data migration approaches are agreed and documented for build readiness.

Build

During Build the solution is realised: configuring Dynamics 365 modules, developing any required customisations, building integrations and ETL/data migration scripts, and preparing training materials and test assets. Continuous developer and integration testing takes place alongside iterative demos so stakeholders can validate incremental functionality.

Test

Test validates that the solution meets requirements and is production-ready through unit, system, integration, performance/security and user acceptance testing (UAT). Defects are triaged and resolved, test evidence is recorded, and acceptance criteria are confirmed so the project can progress to go-live rehearsals.

Deploy

Deploy covers final cutover preparations, dress rehearsals, the go/no-go decision, execution of the production data migration and system provisioning, and immediate post-cutover validation. Detailed runbooks, rollback plans and stakeholder communications are executed to minimise risk and ensure a smooth transition to live.

Hypercare

Hypercare is an intensified support window after go-live where a dedicated team monitors the solution, rapidly resolves incidents, stabilises performance and completes outstanding transition tasks. Knowledge transfer, operational runbooks and a structured handover to business-as-usual (or managed services) are finalised once service stability and acceptance criteria are met.



Key Services Offered

Project set-up & governance

We establish programme foundations during Mobilise using Venture's **RISE** governance framework (Opportunity Governance, Project Governance, Account Management) to define scope, success criteria, RACI, reporting and decision forums. Early deliverables include a project charter, RAID backlog, version-controlled plan (Teams/SharePoint/ADO) and agreed quality gates so the programme proceeds into Design with clear accountability and controlled change.

Solution architecture

Our Solution Architecture service produces a single, approved Blueprint that describes the future-state functional and technical landscape (ISVs, Azure components, integrations, data, reporting, interim states and rollout model). The Blueprint aligns business outcomes to a validated design, captures key risks and open decisions, and becomes the baseline for Build and Test so all teams share a common, governed view of the target solution.

Technical architecture

We design technical architecture to Microsoft best practice (Azure Well-Architected and Cloud Adoption Framework), defining environment topology, security boundaries, release strategy, resilience and non-functional requirements. The Technical Architecture ensures all customisations, extensions and ISV integrations are evergreen-friendly, scalable and maintainable and that deployment/rollback windows and operational runbooks are agreed.

Integration services

Our integration approach is Azure-native: Logic Apps for orchestration, Service Bus for asynchronous messaging, API Management to secure and govern APIs, Data Factory for scheduled extracts/transforms and Key Vault for credential protection. We provide integration patterns, interface-level designs (data flows, mapping, error handling and monitoring), and pre-built accelerators to reduce custom work and keep the platform compatible with Microsoft's evergreen update model.

Data migration services

Our data migration practice delivers repeatable ETL and migration pipelines that map legacy schemas into D365 data structures, using Azure Data Factory and tested migration patterns to reduce risk and ensure data integrity. We combine robust mapping, staging, reconciliation and automated load processes with dress-rehearsals and validation checks so cutover is predictable and auditable.



Key Services Offered

Roles & security

We apply security-by-design: Azure Active Directory for identity, MFA and SSO, least-privilege service principals, role-based privileges and segregation of duties enforced in D365, plus Key Vault for secrets and TLS/encrypted endpoints for all integrations. This layered model delivers auditable access, conditional access controls and configuration that meets public-sector compliance and data-protection requirements.

Testing services

Testing is embedded across the entire project lifecycle and includes automated regression packs, sandbox smoke tests, system/integration/performance/security testing and formal UAT run by business users. We deliver full traceable test artefacts, scenario-based high-volume tests (e.g., month-end, payment runs), defect triage and gated promotion criteria so each release is validated against acceptance and non-functional targets.

Training services

We provide a Train-the-Trainer approach, role-based end-user training and contextual, in-app guidance (Gyde365) to accelerate user proficiency and reduce knowledge erosion. Training is scheduled close to go-live, supported by practical labs, recorded sessions and analytics to measure engagement and target follow-up coaching.

Change management

Change & Engagement is woven into our RISE methodology: stakeholder analysis, impact assessments, communications, readiness checks and adoption tracking are used to ensure people, process and technology change together. We combine structured communications, adoption tooling, readiness dashboards and targeted interventions during Deploy and Hypercare so benefits are sustained post-go-live.

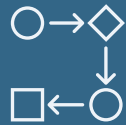
Managed services

Venture's managed services provide application-level support, proactive monitoring, update/version assurance, incident resolution and an annual support bank for ongoing enhancements and advisory. We manage early-life support, legacy decommissioning, knowledge transfer and a formal handover to BAU so the solution remains secure, current and continuously optimised.



Why Venture

We **bring** extensive experience delivering business transformation



We **build** long term relationships that deliver measurable value



We have a **proven** framework designed to align with technology goals



Driving transformation for growth and lasting value –
your Venture starts here.