



# Power Platform & Dynamics 365 Business Process Assessment

Business Applications | Service Definition

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# 1. Introduction

The ANS Power Platform & Dynamics 365 Business Process Assessment is an “ANS Navigator” which is a complimentary engagement that provides you with the resources and information needed to realise your long-term strategic vision and steer your digital transformation journey.

The ANS Business Process Navigator designed to assist you in identifying and understanding your business pains, our workshops will help bring your processes to life by theorising how the tools within Microsoft's Power Platform and the wider Microsoft ecosystem can help.

To enable digital transformation within an organisation, ANS will use the Microsoft next generation of cloud-based intelligent business applications based on the Microsoft Power Platform including Microsoft Dynamics 365, PowerApps, PowerAutomate, PowerBI, Power RPA and Co-Pilot Studio Power Virtual Agents. This solution suite is designed to empower your people to make smarter business decisions faster, enable collaboration across your organisation, and deliver deep insights that help drive your digital strategy.

The added benefit for clients is that Power Platform & Dynamics 365 are built on the Microsoft Business Application platform allowing extensibility and creation of line of specific Client business applications as well as out of the box connectivity to Microsoft Office 365, Outlook, Excel, Word, OneNote and SharePoint productivity tools and Azure services such as Service Bus, Landing zones, Azure Data Analytics. This strategic approach enables both IT and business users and maximizes investment you have already made and fully enables you to meet your key programme principles.

Power Platform & Microsoft Dynamics 365 as a technology platform, provides the tools and capabilities needed to create and maintain a clear picture of every single customer interaction from first contact through to purchase and post-sale. Through the three core pillars of marketing, sales, and service Power Platform & D365, can help reduce costs and increase profitability by organising and automating business processes that nurture customer satisfaction and loyalty.

The Microsoft Power Platform & Dynamics 365 Solution is a market leading solution as recognised by top Industry experts such as Forrester and Gartner with 97% of the Fortune 500 using the Power Platform with over 500,000 customers in 60+ countries and in 40 languages. In addition to being the leader with respect to vision and execution in the marketplace, the Microsoft and ANS combination offer one of the most competitive cost of ownership levels leading to faster payback and return on investment. ANS is committed to ensuring that each and every Power Platform & Dynamics 365 engagement we take on has a clear path to success including objective metrics that can be examined after the first year in order to ensure return.

ANS (Business Applications) has deployed the Power Platform & Dynamics 365 in well over 125 UK clients making us the UK leader for Power Platform & Microsoft Dynamics 365 implementations. Our objective is to deliver projects, on time and on budget with little scope

change and no surprises. Our ability to not only rapidly deploy solutions for clients, but also to stand by these solutions for the first 36 months with the ANS Managed Services is the best in the industry.

## 2. The Business Process Assessment

### 2.1. Overview

The ANS Business Process Navigator will deliver a collaborative workshop and outcome report focusing on the identification and qualification of processes to transform, capabilities to adopt, or initiatives that the business wishes to explore, using Microsoft Power Platform technologies. Where applicable, the discussion may also include other elements of the Microsoft stack, however, the primary technology focus will be on Power Platform. As part of the assessment deliverables, ANS will provide guidance on how you can take their ideas to the next stage of adoption and assistance with understanding the licensing implications of any proposed roadmap or recommendation.

The scope of this Statement of Work is limited to the delivery of the collaborative workshop and its output report. For a deep dive into a specific solution, or for assistance with building a business case / ROI, you are encouraged to look towards ANS' Catalyst or Inspire Navigator.

### 2.2. Workshop Overview

The Business Process Navigator Workshop encompasses the following elements:

**Discussion of business pains and desires** – This provides crucial context for us to understand your business processes and where transformation is suitable / necessary. For a quality delivery, the engagement requires input from your business users and IT function, and we would encourage invitees to spend some time before the session thinking about their own day-to-day business pains.

**Whiteboarding process** – Includes a collaborative mapping out of all of the ideas from the teams, analysing the core problems causing the symptomatic business pains and theorising how Microsoft's Power Platform technology can help to ease / eliminate these problems. This will result in a set of actionable clusters focused on certain processes, capabilities, or initiatives.

**Prioritisation phase** – Discussing the identified processes, capabilities, and initiatives and evaluating their suitability as use cases for a 'flagship' project. A successful flagship will prove the potential of the platform to the business and assist in adoption. This will result in a reduction of use cases down to a shortlist / timeline, which can then be assessed against our success criteria.

**Use Case Assessment Report** – A document summarising and formalising the discussions had, including the use case evaluation process and recommendations for next steps / a future roadmap for you.

## 2.3. The ANS Use Case Success Criteria

Based on our experiences with delivering transformative Power Platform solutions in businesses around the world, ANS has developed a unique set of success criteria by which all use cases will be judged:

- **Visibility**

An effective use case for a flagship will be a process / capability / initiative that will have high visibility across the business. These use cases serve as a beacon of what is possible with the platform and higher visibility will help drive adoption and educate more members about the platform capabilities.

- **Complexity**

A good use-case for a flagship will be a process / capability / initiative that is not too complex. Overly complex use cases take a longer time to launch, whereas targeting less complicated processes can vastly reduce the 'time-to-value.' This in turn will help drive adoption and highlight the rapid development capabilities of the platform.

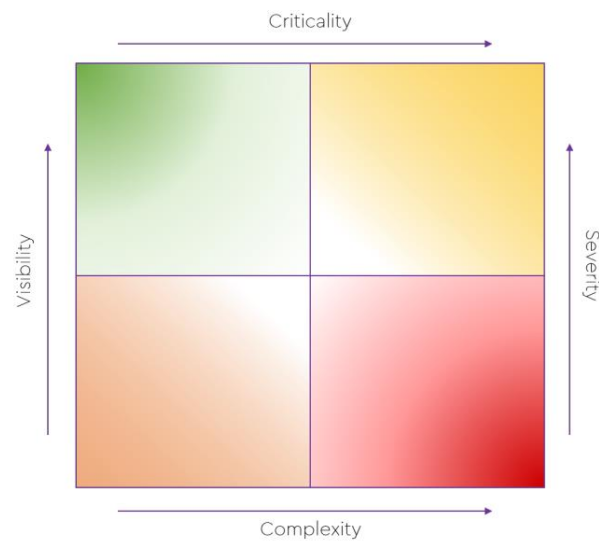
- **Criticality**

A good use case for a flagship will be a process / capability / initiative that is not critical to the day-to-day or high-risk running of the business. The risk of failure for a highly business-critical use case could jeopardise the perception of the platform within the organisation, especially as users and IT get used to using the new tools or limit the chances of getting to go-live as stakeholders may feel nervous about launching the new technology with a critical process. Instead, it is recommended to first target an ancillary, yet wide-reaching, function which will help build confidence in the platform's capabilities.

- **Severity**

An effective use case for a flagship will be a process / capability / initiative that is causing severe business pains. These use cases serve as examples of how Power Platform technology can relieve / eliminate the day-to-day problems of your staff, streamline processes, and increase efficiency.

The shortlist of use cases will be measured against these criteria and recommendations on priorities for next steps will reflect the findings of this evaluation. ANS founded the business with the knowledge that CRM was going to change the behaviours of many organisations and therefore deploying CRM solutions was going to be different. We see that our proven, repeatable, immersive approach drives successful projects, involving change management in fast timescales. We predominantly deliver projects virtually. Having developed this methodology working with geographically dispersed organisations, we see our clients relishing the planned weekly activity in a structured format that is time sensitive to the client's community. The Business Applications team have been delivering projects in this manner since 2008 and have honed our skills and use of technology to make sure that our clients get a wonderful experience, with no wasted time or money.



Use Case Evaluation Grid measuring use cases viability as a flagship solution against ANS 'four success criteria. The most successful use cases will be those that land in the top left quadrant, then the top right followed by the bottom left and poor use cases reside in the bottom right. This visualisation helps to show at a glance the impact and risk of each use case on the shortlist, allowing ANS and its customers to identify a priority for moving forward.

## 3. Delivery Plan

### Business Process Workshop

- Undertake a ½ day workshop in which our experts will guide CUSTOMER's business and IT users in discussing and identifying key business pains and desired outcomes.
- Provide assistance in condensing these ideas into a set of actionable clusters via a virtual whiteboarding process.

### Use Case Report

- Use Case Assessment Report containing:
  - A summary of all ideas discussed, and processes / initiatives highlighted as priorities.
  - All whiteboards and diagrams created during the discussion process.
  - Overview of the shortlist of processes / capabilities / initiatives identified as potential use cases for a 'flagship' engagement.
  - Recommendation and roadmap for next steps moving forward.

## 4. ANS Business Process Deliverables

The output of the ANS Inspire project will be:

- **Use Case Assessment Report**

A summary of all ideas discussed, and processes / initiatives highlighted as priorities.

All whiteboards and diagrams created during the discussion process.

Overview of the shortlist of processes / capabilities / initiatives identified as potential use cases for a 'flagship' engagement.

Recommendation and roadmap for next steps moving forward.