



Power Platform & Dynamics 365 Implementation Services for Not for Profit

Business Applications | Service Definition

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1. Introduction

The ANS Power Platform and Dynamics 365 for Not for Profit implementation service is one that enables Not for Profit organisations to consolidate their legacy systems in order not only to reduce complexity and cost but also to deliver digital transformation across the organisation enabling them to reinvent how they deliver services and serve their volunteers, members, stakeholders and staff by creating new interactions amongst people, data and processes.

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 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 ANS Approach to Delivery

2.1. Overview

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.



CRM projects never really end. As soon as you deliver functionality, new requirements emerge. Often the process of delivering a project throws up new requirements as your users start to realise the possibilities. Because we have been through a process of knowledge transfer and your team own your system, subsequent phases can be delivered more quickly and with reduced input from ANS. We are there to support you with advice on best practice and to impart our

experience; we will also fill any gaps in your knowledge, skill, and resource. The benefit of this to your business is that you get exactly the functionality you need in order to achieve your Business Outcomes, and this is done at a diminishing cost.

Having deployed hundreds of successful clients using our CORE (Customer Owned Rapid Engagement) methodology, ANS is able to leverage a repeatable process for personalising D365 Customer Engagement applications to each customer's unique needs whilst keeping the overall user experience simple and streamlined. Our program consists of six primary components that make up a well-rounded process for producing rapid implementations and highly adopted clients. These include:

- Change Management
- Program Management and Oversight
- Business Modelling and Configuration
- Information Management and Integration
- Customer Training and Readiness
- On-Going Adoption Assurance and Support

We know that our most successful customers take ownership their CRM system. By the time we complete a project we will have trained your team to understand and own your CRM system. Our intention is that you will not be dependent on us or any other third party to extend and maintain your CRM systems. Dynamics 365 is designed to be a flexible platform to change as the needs of your business change, our delivery methodology was conceived to make sure you can take advantage of the Dynamics 365 platform capability.

2.2. Change Management

At ANS, we believe that helping our clients prepare for, implement and manage organisational change is paramount if they are to achieve long-term success. The primary measurement of change "acceptance" during the implementation phase of a CRM project is user adoption. Although, in the end only you can make sure the users use the system – our implementation methodology has been proven to create an environment that makes success much more likely. We know that successful change management is tied to simplicity, ease of use and well-defined processes. One last key concept is one we call "ownership." You are much more likely to achieve the first three if the people who will eventually be asked to use the system are involved in its design. In support of this objective, our methodology revolves around three central themes. They are:

Engagement: Prior to the start of the project, you will organise a Core Team composed of business subject matter experts and CRM Administrators to work directly with the ANS Group team to model and design a CRM System that people will not only use, but also benefit from. The subject matter experts will participate in weekly iteration sessions and will even receive

weekly homework designed to advance their knowledge and understanding of the system and its capabilities. They will also be asked to conduct weekly sessions with an extended group of users and stakeholders to share their progress and bring ideas and critique back to the Core Team. In this way, we widen the sphere of influence and inclusion in the system design.

Your CRM Administrator(s) will also attend the weekly iteration session. They will also receive “admin” training and will even participate in more and more of the configuration work as the project progresses. By the time the project is finished you will not only have a system that works, but also you will have one that the entire team was involved in designing and building. They will “own” the solution – a critical factor to long-term success.

Measurement: Central to the Change Management theme is the principle of “That which is measured gets done”. Early on, your team will be trained to create charts and dashboards designed to measure the actions that indicate that user adoption is being achieved. The ANS team will use them to measure the engagement of the Core Team week to week, and the Core Team will in turn learn to use them to measure the engagement of their constituents and stakeholders. This process begins to create a culture of accountability, which is a cornerstone of value creation.

Analysis: ANS recommends that the client organises an Executive Steering team who will meet regularly with the ANS implementation leadership and sponsor. Using the User Adoption Dashboard, this team will be able to identify positive trends for change and areas for improvement.

2.3. Program Management and Oversight

As with all initiatives, engagement planning, oversight and management are critical components to the success of the deployment. The team at ANS has a streamlined approach to engagement management based on tracking the key milestones of the process and ensuring that the entire team understands the goals and objectives for each week to stay on track.

As a part of the engagement management process, ANS will provide each client with a project plan including tasks, timelines, and resource assumptions during the pre-planning stages of the engagement.

All projects are segmented into four major milestones:

1. **Project Execution:** At the time of contract execution, ANS Group will engage with the client to begin project planning and pre-work. The goals of this phase are to ensure that all parties are on the same page with respect to scope of work, timelines, and the key business objectives that we are trying to accomplish (along with how we will measure success), and to gather important project materials and baseline data. During this organising phase, the client will have several discussions with the ANS Project Manager to

ensure we gather as much information possible so that the initial Modelling sessions are efficient, and we are not repeating things learned during the sales process.

2. **Design Start:** This begins with the first modelling session that provides an overview of D365 Customer Engagement applications that are to be included in this phase of the project.
3. **Design Complete:** As the team works through business modelling sessions and configures D365 to match the client's needs, the project team will facilitate a final design review session to review the system configuration (minus data migration and integration). This will include the D365 configuration in support of the functional scope included in this agreement along with any supporting workflows or other user experience features. Once the client performs this final review, ANS will present a punch list to signify the "freezing" of the system design. Note that data migration and integration will be planned and basic system interaction in place, but specific field mappings, data testing, or data automation will not yet have been finalised at this point in the process. ANS will ensure that all items on the punch list, including data and integration, are addressed and reviewed prior to user training.
4. **Ready for Training:** This milestone will be the final milestone and the final payment trigger for the project. During this checkpoint, the customer will review that the punch list items have been completed, the data migration scripts, and test runs are operating properly, and any other system integration functions have been tested. At this point, ANS have prepared the client to deliver the end user training.

2.4. Business Modelling and Configuration

ANS will plan and facilitate a cycle of design and iteration sessions to model the functional areas of scope. As each session is completed, ANS will develop an iteration design of the system to review with the client. During this review session, ANS will take feedback in the form of a "punch list" and then make adjustments in conjunction with the client team to facilitate knowledge transfer. Once the data model configuration is complete, ANS will hold a final modelling review session with the client team. At the conclusion of this session, a final punch list will be generated. This will constitute the end of the design phase and a freeze on system design for the duration of the project.

As a starting point with all D365 engagements, our first stage of the process is to logically, group the areas of functionality to be deployed into work streams. These work streams can be thought of as key business processes that will facilitate the achievement of the desired business outcomes. For example, a typical Sales based project might include some or all of the following workstreams:

- Business Outcome Requirements
- CRM Solution Overview

- Lead Management
- Account Management
- Contact Management
- Opportunity Management and Sales Process
- Products and Pricing
- Quote Management
- Order Management
- Invoice Management
- Final Review

For each work stream, ANS will facilitate a set of activities to understand and define the information, relationships, process, and requirements in support of the defined work stream. A work stream will consist of modelling sessions to define requirements, configuration workshops to agree on changes and transfer knowledge, configuration changes to D365, punch lists to capture additional changes and completion of punch list items.

Once all the individual work streams have been completed with punch list items documented, the team will facilitate a full system review of the functionality in scope. The team will provide feedback and finalise the punch list described above. As a part of the above process, ANS will, in parallel, be working on data migration and integration processes. This means that ANS will be surfacing data into the actual system as it is built. We find that performing this work together with the modelling process allows the client to see the system relevant to their data, which greatly increases the degree of understanding.

2.5. Information Management and Integration

An integral part of adoption for any CRM platform is a foundation of accurate and complete data. As a part of this project, ANS will facilitate and support the process of migrating core data elements from the client's source solution(s) into D365. Likewise, ANS will lay out a plan for systems integration.

2.6. Customer Training and Readiness

Training is a top success factor for any CRM roll-out. ANS has a distinct training program for System Administrator/Power Users and for End Users.

One of the most important and commonly overlooked segments of the CRM journey is to ensure that the user groups that will be leveraging the D365 platform are properly prepared and trained on how to use D365 Customer Engagement applications in support of the designed business processes implemented during the project. ANS takes a two-tiered approach to training throughout our engagement.

Starting in the first week of the engagement and then throughout the process, ANS will immerse your designated systems administrator in the system starting with our Blue Belt training program to begin to get a deep understanding of the capabilities and ease of configuration of the D365 platform. We believe strongly in the ability of clients to take on minor personalisation tasks moving forward as the business evolves – the System Administration and Power User training process is designed to maximise self-sufficiency beyond the project.

Following hundreds of successful projects, ANS recommends that the best end user training delivery that will support user adoption is training delivered by someone within the client's own business. This approach relies upon the client appointing a trainer (or trainers) that will be responsible for both the initial and ongoing end user training, with this trainer becoming part of the project team as ANS and the client embark on tailoring D365 for the business.

By becoming part of the project team, the trainer will obtain a deep understanding of D365 from the outset and will better understand the 'how to' and more importantly, the 'why'. They will fully understand why D365 was tailored in each way and the business benefits that the system will provide to the organisation.

In addition, ANS, will provide a "Training Preparation, Best Practice and Recommendation" Session. This session is aimed at your Core Team and Dedicated Trainer and will cover recommended training approaches, different training styles available and the importance of senior management involvement in training and adoption. During this session ANS will also work with your team to focus on how best to structure the training.

ANS will also work with the customer to agree some custom training videos. These videos will summarise in 5 – 7 minutes a business process in Microsoft D365. These videos will be specific to the client's configured D365 environment and will allow a user to quickly watch and understand what is expected of them when using D365.

2.7. Ongoing Adoption and Support

ANS provides ongoing support after the project go-live via our Managed Services Support Programs.

The most successful clients are those that view CRM as a journey and as a holistic initiative and not just a system with a project tied to it. The ANS Managed Services programs empower our clients with a structured process and trained professionals in order to ensure their success with D365.

ANS can provide different levels of service to meet our client's varying needs.