

MICROSOFT DYNAMICS 365 CUSTOMER INSIGHTS

Service Definition
G-Cloud 15

REPLY

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SERVICE DESCRIPTION

Features:

Our professional implementation approach is managed by expert consultants, developers and project managers that are all focused on delivering world class value and experience worthy of the Reply brand. We leverage Azure DevOps for transparent project management, providing real-time visibility into implementation progress. Clients can track milestones, tasks, and issues, fostering collaboration and accountability. On go-live day, we have a dedicated consultant available for the full day, offering comprehensive guidance and on the spot training where necessary to ensure a smooth transition. Detailed documentation is provided, empowering your team with valuable resources for ongoing success. With a focus on knowledge transfer, we equip you with the tools and expertise to maximize your Dynamics 365 Customer Insights investment from day one.

Benefits

Partnering with our Microsoft Dynamics Customer Insights implementation service offers a unique blend of local expertise, proven track record, and personalized attention. With a team of skilled UK-based resources, we ensure seamless communication and a deep understanding of your business environment. Our extensive experience spans multiple industries, including the public sector, enabling us to tailor solutions to your specific needs. As a smaller firm, we prioritize building close relationships with clients, providing dedicated support and responsiveness. Additionally, by leveraging the power of the Reply Group, we can extend our services and offerings, giving you access to a comprehensive suite of solutions from a global network of experts



HOSTING INFRASTRUCTURE

Microsoft Dynamics 365 Sales Enterprise is a cloud-based solution hosted on Microsoft's secure Azure cloud platform. Customers can choose the data center region where their data is stored to comply with data residency requirements.

Disaster Recovery

Microsoft Dynamics 365 Sales Enterprise is hosted in Microsoft's globally distributed data centers, which provide high availability, security, and compliance. Automatic backups and geo-redundant data replication help protect customer data and enable disaster recovery



ONBOARDING

We start by identifying all stakeholders involved in the implementation project. This includes key decision-makers, department heads, end-users, IT personnel, and any other individuals or groups who will be impacted by the new system. We conduct stakeholder interviews or workshops to gather insights into their requirements, expectations, and concerns.

We take the lead in establishing clear guidelines and protocols for communication, decision-making, and project management. This involves defining roles and responsibilities, setting up regular meetings and reporting mechanisms, and determining the preferred communication channels for collaboration. A RACI is compiled to identify members 'Responsible' 'Accountable' 'Consulted' and 'Informed'

Together with the client, we define the scope of the implementation project. This involves identifying the modules, functionalities, and features that will be included in the initial release. We ensure that the scope is realistic, achievable within the proposed timeline, and aligned with the client's business objectives.

We work closely with the client to break down the project scope into manageable units of work using Agile or Hybrid Agile methodologies depending on the type of project. We start by defining epics, which represent large, high-level features or functionalities of the system. Then, we break down epics into smaller features and user stories that represent specific user requirements or tasks. For each user story, we define clear acceptance criteria that outline the conditions under which the functionality will be considered complete and ready for deployment.

Offboarding

We will ensure a smooth and professional offboarding process after the successful implementation of your new system or in the event of changing delivery partners.

Documentation: We will meticulously organize and hand over all project documentation, including requirements, design specifications, configuration details, and user manuals, to your designated team. This comprehensive documentation will serve as a valuable reference for your internal staff responsible for maintaining and supporting the system.

Knowledge Transfer: Our team will conduct comprehensive knowledge transfer sessions with your staff. These sessions will cover critical topics such as system configuration, customizations, integrations, data management, reporting, and troubleshooting procedures. We encourage your team to actively participate and ask questions to ensure a seamless transition.

Post-Implementation Support: We understand the importance of ongoing support, and therefore, we will offer a post-implementation support period. During this time, our team will be readily available to address any immediate issues, concerns, or questions that may arise as your organization starts using the system independently.

User Training: We will ensure that all end-users and key personnel within your organization receive adequate training on the new system. If needed, we can provide refresher training sessions or arrange for train-the-trainer programs to help your organization build internal training capabilities.

Transition Plan: Our team will develop a detailed transition plan that outlines the roles, responsibilities, and timelines for handing over the system to your team. This plan will include steps for knowledge transfer, documentation handover, support escalation procedures, and any other necessary activities.

Access to Data

After the successful implementation, your organization will retain full access to its business data, governed by the security roles and permissions defined during the project. The system's access controls have been configured to align with your company's policies, ensuring that only authorized personnel can view and modify data based on their respective roles and permissions.

Your system and associated data are hosted on Microsoft's cloud platform, which offers robust data protection measures. These include advanced encryption, regular backups, and redundancy across multiple data centres. This cloud infrastructure provides high availability and safeguards against potential data loss scenarios, ensuring your critical information remains secure and accessible



SUPPORT AND MAINTENANCE

Service Desk

We offer two types of support options:

1. Standard Contract:

This is a limited contract with a fixed number of tickets per year.

- It covers only break-fix incidents, meaning it addresses issues or defects that arise in the system.
- This option does not provide additional services or support beyond resolving break-fix incidents.

2. Flexible Contract:

- This contract type is more comprehensive and flexible.
- The client purchases a certain number of "flexible" hours upfront.
- There is no limit on the number of tickets that can be raised.
- The time spent on resolving tickets is deducted from the purchased "flexible" hours.
- The "flexible" hours can also be utilized in two additional ways:
 - a. Projects: Clients can book projects a month in advance, and the required hours will be deducted from the "flexible" hours.
 - b. Backlog: Clients can agree on a set number of hours upfront that will be used every month for support activities.

Service Level Agreement

- P1 (Business Critical): Response SLA within 30 minutes, Resolution SLA within 6 hours.
- P2 (Business Affected): Response SLA within 1 hour, Resolution SLA within 1 business day.
- P3 (Non-business Critical): Response SLA within 3 hours, Resolution SLA within 10 business days.
- P4 (Non-business Impact): Response SLA within 6 hours, Resolution SLA within 30 business days.

Planned Maintenance

One of the key advantages of the solution is that it leverages the power of Microsoft's cloud services, ensuring that the system is always up-to-date with the latest features and security patches. Microsoft takes care of the entire maintenance process, allowing you to focus on your core business operations without worrying about the underlying infrastructure.

Microsoft regularly releases updates for its cloud services, including the components that powers the solution. These updates are designed to enhance functionality, improve performance, and address any security vulnerabilities that may arise. These updates are rolled out automatically, without requiring any manual intervention from your side.

With a cloud-based solution, you no longer need to worry about manually applying updates or performing maintenance tasks. Microsoft's team of experts handles the entire process seamlessly in the background, ensuring that your system is always running the latest version with the most up-to-date features and security protocols. Microsoft's automatic update process is designed to ensure that all components of the solution, including the underlying infrastructure and integrated third-party services, remain compatible and work seamlessly together. This eliminates the risk of compatibility issues that often arise when manual updates are performed on complex systems.

By automating the update and maintenance process, Microsoft significantly reduces the risk of downtime or service disruptions. Updates are applied during designated maintenance windows, minimizing the impact on your business operations. Additionally, the automatic nature of the process eliminates the potential for human error, further enhancing the reliability and uptime of the solution.



Emergency Maintenance

While Microsoft's automatic update process ensures that your cloud-based solution is regularly updated with the latest features and security patches, there may be instances where critical updates need to be applied on an emergency basis. In such scenarios, Microsoft follows a well-defined process to ensure that these updates are deployed swiftly and efficiently, minimizing any potential disruption to your business operations.

Microsoft understands the importance of maintaining transparency and keeping you informed about any emergency maintenance or critical updates that may impact your operations. In the event of a critical update, you will receive advanced notification from Microsoft, outlining the details of the update, its potential impact, and the scheduled deployment timeline.

In the rare event that an issue arises during or after the deployment of a critical update, Microsoft has robust rollback and recovery procedures in place. These procedures allow for the swift restoration of the previous stable state, ensuring that your operations can resume without significant disruption.

Incident Management

In the event of an incident or disruption that impacts your cloud-based solution, Microsoft has a robust incident management process in place to ensure prompt resolution and minimize the impact on your business operations.

Microsoft's cloud infrastructure is continuously monitored by a dedicated team of experts, leveraging advanced monitoring tools and technologies. This continuous monitoring enables the rapid detection of any incidents or disruptions, whether they originate from within the infrastructure or external factors.

Once an incident is detected, Microsoft's incident management team swiftly triages and prioritizes it based on the severity of the impact and the number of customers affected. Incidents that have a critical impact on business operations or affect a large number of customers are given the highest priority for resolution.

Microsoft's incident management process is designed to ensure a rapid response to any incidents that arise. Depending on the severity of the incident, appropriate resources are immediately assigned, and escalation procedures are followed to involve subject matter experts and senior engineers as needed.

Microsoft's team of experts works diligently to investigate the root cause of the incident, leveraging their extensive knowledge of the cloud infrastructure, underlying technologies, and the solution itself. Once the root cause is identified, a resolution plan is developed and implemented to address the issue promptly.

Throughout the incident management process, Microsoft maintains transparent communication with customers impacted by the incident. Regular status updates are provided, keeping you informed about the progress of the resolution efforts, expected timelines, and any workarounds or mitigation steps that can be taken to minimize the impact on your operations.

After an incident has been resolved, Microsoft conducts a thorough post-incident review to analyze the root cause, identify any areas for improvement, and implement preventive measures to reduce the likelihood of similar incidents occurring in the future. This continuous improvement process ensures that the reliability and resilience of the cloud infrastructure and solution are constantly enhanced.



SECURITY

Personnel Security

As a Specialist Cloud Service, the capability being offered is not limited to specific Impact levels (as it is not infrastructure, software or a platform) and can be used, subject to personal Security Clearance levels. Reply consultants are mostly Security Cleared (SC), some have higher-level Developed Vetting (DV) clearances. We also have a pool of NPPV3 Consultants for Policing work. The majority of our work for both public and private sector clients is at IL2 but we work in the Official, Secret and Top-Secret domains. Our hard and soft information security processes have been designed and approved by independent CESG CLAS accredited consultants.

Information Security

We are ISO27001, Cyber Essentials certified and our Quality Assurance processes are based upon and compliant with our ISO 9001 accreditation. Our Information Security processes are directly guided by our ISO27001 accreditation. We shall adhere to local information and other security policies and will apply local Security Operating Procedures (SyOPs) as may exist. If such do not exist we shall apply our own SyOPs.

Physical Security

The Main Reply Office (London, UK) is a Police Accredited Secure Facility (PASF) with access controls for each point of entry. All Laptops/Phones must be stored securely overnight. When working on a client-site our consultants adhere to client security policies.



TRAINING

Our train-the-trainer approach is designed to create a sustainable knowledge-transfer model within your organization. We begin by identifying key individuals from your team who will undergo extensive training to become subject matter experts (SMEs) on the solution. These SMEs will then be responsible for training and upskilling the rest of your workforce, ensuring a consistent and tailored learning experience.

Benefits of the Train-the-Trainer Approach:

- **Scalability:** By training your internal SMEs, you gain the ability to conduct training sessions on an ongoing basis, accommodating new hires, role changes, and refresher training requirements.
- **Contextual Knowledge:** Your SMEs have in-depth knowledge of your organization's processes, workflows, and unique requirements, allowing them to provide training that is directly relevant to your business context.
- **Cost-Effective:** Compared to relying solely on external trainers, the train-the-trainer approach offers a more cost-effective solution, especially for ongoing training needs.
- **Customized Content:** Your SMEs can tailor the training content and delivery methods to align with your organization's specific learning preferences and requirements.

Comprehensive Training for Your SMEs

To ensure that your SMEs are thoroughly prepared to train others, we provide them with extensive training covering all aspects of the solution. This includes:

- **Functional Training:** In-depth training on the various modules, features, and functionalities of the solution, ensuring a comprehensive understanding of its capabilities.
- **Technical Training:** For SMEs responsible for technical aspects, we provide training on system administration, configuration, and integration with other systems.
- **Training Delivery Skills:** We equip your SMEs with effective training delivery techniques, including presentation skills, adult learning principles, and facilitation methods.
- **Continuous Support:** Your SMEs will have access to our subject matter experts for ongoing support, enabling them to address advanced queries and stay up-to-date with system updates.



ORDERING AND INVOICING PROCESS

To begin the process, please contact glue.frameworks@reply.com with details of your organisation, role and high-level requirements.

Our Framework Manager will connect you to our experts and from here we will organise an introductory discussion to go into more detail and shape a proposed engagement that suits your needs.

We invoice for both fixed price and time and materials engagements one month in arrears. For fixed price engagements, this takes place upon completion of the deliverable(s), or in stages, if the size of the engagement is greater than £40,000 excluding VAT.

Payment terms are 30 days net of receipt of invoice.



CUSTOMER RESPONSIBILITIES

The successful implementation and adoption of a system require close collaboration and active participation from the customer organisation. While we, as the implementation partner, bring expertise and best practices, the customer plays a crucial role in ensuring a smooth and effective project delivery. Here are the key responsibilities that the customer should fulfil:

1. Executive Sponsorship and Organizational Commitment:

- Secure strong executive sponsorship and commitment from top management.
- Ensure that the project is viewed as a strategic initiative with dedicated resources and funding.
- Foster a culture of change and encourage user adoption across all levels of the organization.

2. Project Governance and Decision-Making:

- Establish a robust project governance structure with clearly defined roles and responsibilities.
- Assign a dedicated project manager and subject matter experts from the customer side.
- Empower decision-makers to make timely and informed decisions throughout the project lifecycle.

3. Business Process Alignment:

- Thoroughly document and review existing business processes.
- Identify opportunities for process optimization and align processes with best practices.
- Actively participate in the design and configuration of the system to meet specific business requirements.

4. Data Migration and Quality Assurance:

- Ensure the availability and accuracy of historical data required for migration.
- Allocate resources for data cleansing, validation, and quality assurance activities.
- Provide subject matter experts to oversee and validate the data migration process.

5. User Acceptance Testing and Training:

- Allocate dedicated resources for user acceptance testing and training activities.
- Ensure active participation from end-users in testing scenarios and providing feedback.
- Identify key personnel to undergo train-the-trainer programs for sustainable knowledge transfer.

6. Change Management and Communication:

- Develop and implement a robust change management plan to facilitate user adoption.
- Communicate project goals, timelines, and expectations to stakeholders across the organization.
- Address concerns, provide regular updates, and celebrate milestones to maintain project momentum.

7. Post-Implementation Support and Continuous Improvement:

- Allocate resources for post-implementation support and ongoing system maintenance.
- Establish processes for capturing user feedback, addressing issues, and identifying areas for improvement.
- Foster a culture of continuous learning and process optimization to maximize the value of the investment.

By actively fulfilling these responsibilities, the customer organization can ensure a collaborative and effective partnership with the implementation team. This joint effort will facilitate a smoother transition,



minimise project risks, and ultimately drive the successful delivery and adoption of the system, enabling the organization to achieve its strategic goals and realize the full benefits of the investment



TECHNICAL REQUIREMENTS

Browser

As a cloud-based solution, our system can be accessed through various web browsers, providing users with a seamless and flexible experience across multiple devices and platforms.

Supported Browsers:

- Microsoft recommends using the latest versions of the following web browsers for optimal performance and security:
- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Apple Safari (for macOS users)

While older versions of these browsers may work, Microsoft strongly advises users to keep their browsers up-to-date to ensure compatibility with the latest features, security updates, and performance enhancements.

Browser Configuration:

To ensure a smooth and secure experience, users should configure their browsers to enable the following settings:

JavaScript: Enabled

Cookies: Enabled

Pop-up Blocker: Disabled or configured to allow pop-ups from the system's domain

Additionally, users may need to adjust their browser's security settings to allow the system to access certain features or functionalities, such as file downloads, camera access (for document scanning), or integration with third-party applications.

Cross-Browser Compatibility:

Microsoft's solutions are designed to be compatible with the latest versions of popular web browsers, ensuring a consistent user experience across different platforms and devices. However, certain advanced features or functionalities may have specific browser requirements, which will be communicated to users as needed.

Internet Access

Internet Access Requirements for Cloud-Based Microsoft software solutions

To ensure a seamless and efficient experience when accessing our cloud-based solution, users must have a reliable and high-speed internet connection. The following internet access requirements should be met:

1. Bandwidth:

- Minimum recommended bandwidth: 1 Mbps (download and upload)
- Optimal bandwidth: 5 Mbps or higher (download and upload)
- Higher bandwidth may be required for resource-intensive operations, such as large file uploads or downloads.

2. Internet Connection Type:

Broadband internet connections are recommended for optimal performance, such as:

- Cable
- DSL



- Fiber
- Dedicated internet circuits (for larger organizations)

3. Latency and Packet Loss:

- Low latency (ideally less than 100ms) and minimal packet loss are essential for a responsive user experience.
- High latency or packet loss can lead to delays, timeouts, and disruptions when accessing the system.

4. Network Connectivity:

- A stable and secure network connection is crucial for accessing the cloud-based solution.
- Users should ensure their network infrastructure (routers, firewalls, etc.) is configured to allow outbound connections to the Microsoft cloud services.

5. Network Security:

Appropriate security measures should be implemented to ensure secure access to the system, such as:

- Virtual Private Network (VPN) for remote access
- Firewall rules to allow communication with Microsoft cloud services
- Antivirus and malware protection

Accessibility

Microsoft Dynamics is designed with accessibility in mind to ensure users with disabilities can effectively use the application. Some key accessibility features include:

- **Keyboard Navigation:** The entire user interface can be navigated using only the keyboard, without relying on a mouse. Shortcut keys allow quick access to common actions.
- **High Contrast Modes:** Dynamics 365 supports high contrast modes for users with visual impairments, allowing easy reading of text and UI elements.
- **Screen Reader Support:** Dynamics 365 integrates with popular screen readers like NVDA and JAWS, providing audible feedback and descriptions of UI elements.
- **Zoom Functionality:** Users can zoom in/out of the application interface to increase text/object size as needed.
- **Closed Captioning:** For any video content, closed captioning can be enabled to display text transcripts.
- **Accessibility Checker:** When authoring documents/reports, an accessibility checker analyzes the content for potential issues affecting readability.
- **Dictation Support:** Voice dictation capabilities allow hands-free data entry and navigation for users unable to type.
- Microsoft regularly updates Dynamics 365 to comply with accessibility standards and guidelines to create an inclusive experience for all users, regardless of ability.



ABOUT REPLY

Reply is a company that specialises in Consulting, Systems Integration and Digital Services with a focus on the conception, design and implementation of solutions based on the new communication channels and digital media.

Reply partners with key industrial groups in defining and developing business models made possible by the new technological and communication paradigms such as Artificial Intelligence, Big Data, Cloud Computing, Digital Communication, the Internet of Things and Mobile and Social Networking. In so doing, it aims to optimise and integrate processes, applications and devices.

Reply's offer is aimed at fostering the success of its customers through the introduction of innovation along the whole economic digital chain. Given its knowledge of specific solutions and due to a consolidated experience, Reply addresses the main core issues of the various industrial sectors.

Through its network of specialist companies, Reply supports some of Europe's leading industrial groups in Telco & Media, Industry & Services, Banks & Insurance, and Public Administration to define and develop business models, suited to the new paradigms of Artificial Intelligence, Big Data, Cloud Computing, Digital Media and the Internet of Things.

We make innovation happen.

We started with a small team and a purpose: to help the digital revolution happen. Today, we are a team of more than 14,600 people in 16 different countries but we still have the same DNA, made up of agile, vertical task forces and an inner passion for innovation.

We are a decentralised network of specialised companies.

Among Replyers, you will find passionate geeks, visionary strategists, and creative minds, each with sharp skills in a specific business, who cooperate together and never stop learning from each other.

Make forward, act sustainably.

We know a sustainable future is possible and technology can be a strong asset to reach it. As leaders in digital transformation, we push for change and operate in full accordance with the highest ethical standards and with respect for the rights of future generations