



Dynamics 365 Migration and Power Platform Application Modernisation

Service Definition Document
G-Cloud 15

Status: Definitive

Security Commercial – In Confidence

Version no.1/0

THINKING
BEYOND
LIMITATIONS

We're Kainos

Formed in 1986, we set about finding the best people to tackle the most difficult digital work. We fostered a culture where people truly care for each other and the world around them.

Our reputation for software engineering and problem-solving was quickly established, and our customers started to view us more as their colleagues

We're much bigger now, helping organisations across the globe to navigate change in more ways than ever. But some things never change, like our commitment to our people, delighting our customers, and our technical ability

Some say we're leading a quiet revolution in digital, but if you ask us, we're just doing our bit to make the world a little bit better.



3,132 amazing
people



13 consecutive
years of growth



40 years
of innovation



£382m revenue
(FY2024)



13 locations
globally



FTSE 250 listed
tech company



Our core expertise

The digital revolution is already happening. We're leading from the front to help our clients **seize every digital opportunity** and be future-ready.



Cloud



Business Applications



Data and AI



Managed services



Engineering



Service and
experience design



Workday services
and products

- Test
- Audit
- Shield
- Deployment
- Optimisation
- Spark & Grow

Dynamics 365 Migration and Power Platform Application Modernisation

A structured assessment, migration and modernisation service to support organisations moving from legacy Dynamics applications or third-party systems into Dynamics 365, complemented by modernisation of related applications using the Microsoft Power Platform. The service covers discovery, migration planning, solution design, data readiness, integration review, modernisation pathways, testing and deployment. The aim is to provide a clear, governed and efficient transition to Dynamics 365 with aligned Power Platform-based applications.

Features

1. Discovery of existing Dynamics and legacy application landscape
2. Assess data quality, structures and dependencies for migration
3. Identify modernisation opportunities using Power Apps and Dataverse
4. Define migration scope, strategy and target architecture
5. Configure Dynamics 365 environments and required Power Platform services
6. Migrate data, workflows, forms, entities and configurations
7. Modernise legacy applications into Power Apps and Power Automate
8. Validate integrations and update API connections
9. Conduct testing, UAT and readiness sign-off
10. Deploy solutions and provide handover documentation

Benefits

1. Transition to supported, scalable Microsoft cloud business applications
2. Reduce dependency on legacy Dynamics or third-party systems
3. Improve performance, security and compliance using modern cloud services
4. Simplify workflows using low-code Power Platform capabilities
5. Decommission unsupported applications and reduce technical debt
6. Lower maintenance effort and operational overhead
7. Improve user experience through modern interfaces and automation
8. Establish governance and control for enterprise AI usage
9. Increase agility for future enhancements
10. Establish consistent governance for business applications

Service Overview

The Dynamics 365 Migration and Power Platform Application Modernisation service provides organisations with a structured approach to moving from legacy Dynamics solutions or third-party applications into the Dynamics 365 platform, while modernising complementary or dependent applications using the Power Platform. The service ensures that applications, workflows, data and integrations are transitioned into a supported, scalable cloud environment with appropriate governance and technical architecture.

The engagement includes discovery, assessment, migration planning, solution design, modernisation analysis, integration review, testing and deployment. Activities are focused on reducing technical debt, improving application performance and positioning the organisation for future enhancements

Scope of Work

Discovery & Application Landscape Assessment

A discovery phase is conducted to understand the current Dynamics environment and related legacy applications. Activities include:

- Reviewing the existing Dynamics 2011/2013/2016, on-premises CRM or third-party systems
- Identifying customisations, entities, workflows, plugins and integration points
- Assessing application usage, dependencies and operational processes
- Reviewing supported and unsupported custom code
- Identifying manual processes suitable for Power Apps or automation modernisation
- Validating environment architecture and authentication models

Outputs include an inventory of

applications, customisations, integrations and data sources relevant to the migration.

Data Assessment & Readiness Review

As data quality significantly impacts migration success, a structured data review is conducted. This includes:

- Assessing data volumes, structures, duplicate content and field utilisation
- Reviewing historical data requirements, retention needs and archiving policies
- Identifying cleansing, mapping and transformation requirements
- Reviewing source and target schema differences
- Identifying data migration risks and establishing mitigation actions

A data readiness summary is produced to support planning and scoping activities.

Modernisation Opportunity Assessment (Power Platform)

Legacy applications and custom CRM extensions are reviewed to determine suitability for modernisation. Activities include:

- Identifying applications that can be replaced by Power Apps or Dataverse
- Reviewing manual processes that can be automated through Power Automate
- Evaluating opportunities to consolidate functionality into model-driven apps
- Assessing need for custom connectors or Power Pages solutions
- Reviewing licensing implications and environment structure

A modernisation map is provided, categorising applications by retain, rebuild, re-platform or retire.

Migration Strategy & Solution Design

A detailed migration plan is produced, covering:

- Target Dynamics 365 modules and required Power Platform features
- Recommended architecture, including Dataverse structure and integrations
- Migration approach (standard upgrade paths, rebuild, data-only migration etc.)
- Definition of required extensions, customisations and entity modelling
- Data migration design, including mapping and transformation rules
- Cut-over strategy and go-live plan

The approach ensures a predictable and controlled transition from legacy systems to Dynamics 365.

Environment Preparation & Configuration

To support implementation, the service includes:

- Provisioning and configuring Dynamics 365 environments
- Establishing Power Platform environments, DLP policies and security roles
- Reviewing identity models and access controls
- Configuring Dataverse tables, forms, views and business rules
- Preparing integration endpoints and required connectors

This ensures that the target solution is configured in alignment with governance and platform standards.

Migration Execution

The migration is carried out according to the approved design. Activities may include:

- Extracting data from on-premises or third-party systems
- Performing transformation and mapping based on design specifications
- Loading data into Dataverse and validating accuracy
- Recreating or re-implementing workflows, plugins and automation using Power Automate
- Rebuilding customisations using model-driven app components
- Testing integrations and updating API endpoints

A series of validation steps ensure completeness and accuracy.

Application Modernisation Delivery

Where legacy functions are modernised, the following activities are executed:

- Building Power Apps (model-driven or canvas) to replace outdated applications
- Implementing process automation using Power Automate
- Deploying Dataverse-based solutions to standardise data structures
- Designing interfaces aligned to modern usability standards
- Ensuring alignment with governance, security and data policies

Each modernised component is tested and validated with users.

Testing & Acceptance

Structured testing is conducted to ensure functional and performance readiness. This includes:

- Unit testing of migrated features and workflows
- System testing across Dynamics 365 and Power Platform components
- Data validation and reconciliation
- End-to-end integration testing
- User acceptance testing involving business stakeholders
- Resolution of defects and readiness confirmation

Testing results form part of the acceptance documentation.

Deployment & Handover

Once testing is complete, the solution is deployed into the production environment. Activities include:

- Executing cutover tasks and final data migration
- Configuring user roles, permissions and access
- Deploying updated applications, automations and integrations
- Providing training for administrators and users
- Conducting handover sessions and transferring operational documentation

Deployment ensures a controlled transition with minimal disruption.

Deliverables

- Application and environment discovery report
- Data readiness and migration assessment
- Application modernisation assessment (Power Platform)
- Migration strategy and target architecture design
- Environment and governance configuration recommendations
- Data migration mapping and execution summary
- Modernised application builds (Power Apps / Automations)
- Testing documentation and acceptance outputs
- Deployment documentation and handover
- Strategic roadmap for future enhancements

Methodology

The methodology for this service follows structured phases:

Phase 1: Mobilisation

Kick-off, stakeholder alignment and planning.

Phase 2: Discovery & Assessment

Review applications, data, integrations and

modernisation opportunities.

Phase 3: Solution Design

Define migration approach, architecture and technical requirements.

Phase 4: Environment Preparation

Configure target environments and required governance controls.

Phase 5: Migration & Modernisation Delivery

Execute data migration, solution rebuilds and workflow modernisation.

Phase 6: Testing

Functional, integration and user acceptance testing.

Phase 7: Deployment

Production deployment and cutover activities.

Phase 8: Handover & Recommendations

Document and transition the solution to operational teams.

Roles & Responsibilities

Supplier Team

- Dynamics 365 Architect
- Power Platform Consultant
- Data Migration Specialist
- Business Analyst
- Project Manager

Customer Team

- System Owner(s)
- IT Administrators
- Business Process Representatives
- Data & Security Officers

Estimated Duration

Typically 6–12 weeks for a small / low complexity migration. The duration varies depending on the size of the existing environment, data volumes and the number of applications being modernised.



Where we are

The Americas

Buenos Aires
Indianapolis
Nova Scotia
Toronto

UK and Ireland

London
Birmingham
Belfast
Derry
Dublin

Central Europe

Gdansk
Helsinki
Paris
Wommelgem

What makes us stand out



Our people



True collaboration



Innovation



Digital know-how



Common goals



Trust



Digital Services

We are **engineers**, specialists. We **overcome big challenges** for our clients, through delivery of **intelligent** digital services that use the best in **talent and technology**.



55 million UK citizens

positively impacted by
services we've delivered



**892
customers**



13 locations

And growing



99% of customers

rate our service as good,
great or excellent



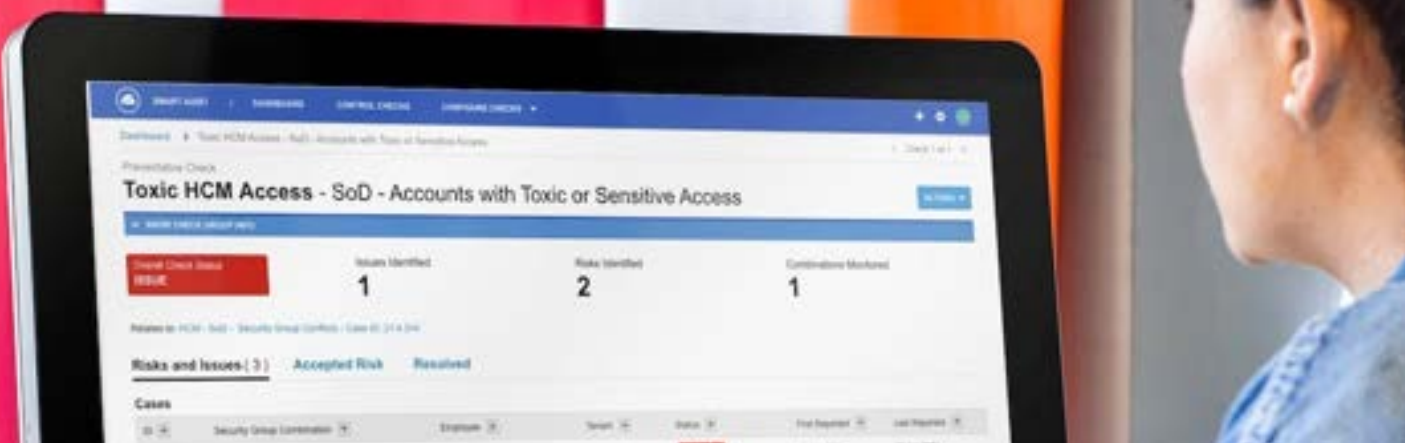
Key partners

Working closely with
Microsoft and AWS to
deliver results



Award-winning

90+ industry awards



Workday

Kainos is a Workday **phase one prime status partner** in all European, North American and Asia Pacific markets. We have worked with many public and private sector customers of various sizes and scale in over **40 countries worldwide**.



Partner Since 2011

We are the only certified Workday Services, Technology and Extend partner globally.



Workday Services

Full range provider from pre-deployment consulting, implementation and support.



650+ Customers

We have deployed to over 650 customers and are a proud Workday customer also, using HCM, Financials, Recruitment, Planning and PSA to run our business.



Workday Public Sector

We have worked with many UK Public Sector customers with their initial deployment, post-deployment support and adoption of new modules.



Kainos Smart

Our product is deployed to 500+ customers globally saving them 1000s of testing hours.



900+ Consultants

Hold over 2,700+ Workday certifications covering all areas of the platform.

65 million

citizens positively impacted
by services **built by Kainos**
for the UK Government



Every driver & every car on the road
Every piece of work to fix roads
Every court case & every prisoner
Every home helped with help-to-buy
Every passport & renewal application
Every COVID test sent out
Every COVID test result
Every user of the NHS App

Every voter registered
Every company opened & closed
Every UK civil servant trained
Every piece of produce grown in the UK
Every thing imported & exported to the EU
Every benefit fraud prevented
Every body's pension details

Our Social Values and commitment to HM Government strategy



Education & Capability Building

We empower people through technical and behavioral learning programs, academies, and outreach projects, fostering skills development and inspiring future technology leaders across communities and organisations.

Social Responsibility

Tackling workforce inequality and ensuring equal access to technical and vocational education, through our Academies, Camps and Earn as you Learn schemes.

Innovation & Future Readiness

Driving continuous improvement through technology

Health, Wellbeing & Accessibility

We support colleagues' physical, emotional, and career wellbeing through initiatives, guidance, and inclusive design, ensuring equal access, experiences, and compliance for all users with diverse needs.

Climate Action & Sustainability

With a comprehensive sustainability strategy underway, we will be a Carbon Net Zero company by 2030.

Equality, Diversity & Inclusion

Maximising service experience for citizens and civil servants by delivering projects with diverse teams, underpinned by our BAME, LGBTQIA+ and female communities.



The Code of Ethics

We are guided by our 6 ethical principles.



Wellbeing

We protect the wellbeing of our staff, customers and communities.



Equality

We improve access and inclusion and minimise bias.



Transparency

Our decisions are traceable and accountable.



Integrity

We hold ourselves and others to ethical standards.



Environment

We act responsibly towards the Earth and its resources.



Initiative

We take initiative to deliver social value and positive impacts.

BCDR and Exit Plan

Business Continuity and Disaster Recovery (BCDR)

A Business Continuity Plan can be provided if required. This shall set out the arrangements to be invoked in the event of an actual or perceived threat to business continuity, to ensure continued operation of the system and continuity of the services provided by Kainos pursuant to the Prime Agreement and shall include: the alternative processes, options and responsibilities that may be adopted in the event of a failure or disruption to the system and/or services provided by Kainos pursuant to the Prime Agreement; and the steps to be taken by Kainos upon resumption of the system and services provided by Kainos pursuant to the Prime Agreement in order to address any prevailing effect of the failure or disruption including a root cause analysis of the failure or disruption.

Exit Plan

An Exit Plan can be provided if required to detail the steps that would be carried out to ensure smooth transition of Kainos services to a new supplier. The steps outlined in the Exit Plan will help mitigate against any disruption to the service during the transition period. It is assumed that any new supplier will themselves have a procedure they wish to follow during the transition period, and as such the steps in this Exit Plan will serve as a checklist for the new supplier to ensure all key areas of the transition have been covered. The Exit Plan will therefore be subject to refinement should it be exercised.

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Corporate information

"Kainos" is the trading name of the Kainos group of companies, further information on which can be found here: <https://www.kainos.com/corporate-information/>.

Kainos Software Limited/ Kainos WorkSmart Limited, will be the contracting entity under this tender / for the provision of the service and may be assisted from time to time by other Kainos group companies.

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Kainos considers that the following information provided in this document is exempt from disclosure under the Freedom of Information Act 2000 (FOI):

The CVs of staff qualify under the "Personal Information Exemption (s.40)" of the Freedom of Information Act and are exempt from disclosure under the Data Protection Act 1998. The Period for which this information should be confidential is the lifetime of the Data Subject.

Rate and pricing information is confidential and commercially sensitive and covered by the 'Commercial Interests' exemption (s.43) of the FOI, as the release of this information is likely to prejudice the commercial interests of Kainos and is likely to adversely affect its (and the Customer's) future negotiating position. The period that this information should be confidential for should be 5 years.