



littlefish
GROUP

Microsoft Dynamics

Design, Build, Deployment and
Managed Services

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Service Overview

Littlefish Empowering Your Business with Microsoft Dynamics Solutions

Empower your organisation with the full capabilities of Microsoft Dynamics 365 through Littlefish's comprehensive services. We go beyond basic CRM and ERP implementations to deliver intelligent business applications that modernise operations and enhance engagement with your customers or citizens. With an end-to-end portfolio of services tailored to your needs, Littlefish enables organisations of all sizes – from local councils to central government departments – to optimise processes and achieve strategic objectives.

At Littlefish, we specialise in delivering solutions across all major Dynamics 365 applications, including:

- **Dynamics 365 Customer Service:** Omnichannel engagement and case management for improved customer support.
- **Dynamics 365 Sales:** Sales pipeline management and stakeholder engagement, driving better relationship management.
- **Dynamics 365 Field Service:** Mobile workforce enablement (scheduling, dispatch) to enhance field operations efficiency.
- **Dynamics 365 Customer Insights (Marketing):** Targeted multi-channel communications and customer/citizen journey analytics.
- **Dynamics 365 Project Operations:** Project resource management and time-sheeting for end-to-end project delivery oversight.
- **Dynamics 365 Business Central:** A cloud-based ERP solution for mid-sized organisations, connecting financials, sales, service, and operations in one integrated system. Business Central streamlines core business processes like accounting, supply chain, and inventory management, eliminating data silos and improving real-time visibility across the business.

Whether you are looking to migrate from legacy on-premise systems, rescue a failing implementation, or streamline your financial operations, our team of experts is here to guide you every step of the way.

Our Dynamics 365 services portfolio covers everything needed to plan, build, and run effective solutions. Key service offerings include Consultation & Advisory, Solution Implementation & Customisation, Training & Enablement, Managed Support Services, and Continuous Optimisation & Upgrades. In each area, Littlefish combines deep Dynamics 365 CRM and Business Central expertise with industry best practices to deliver tangible business value. The sections below detail each service, followed by a summary table for quick reference.

Service Features

Consultation & Advisory (Assessment & Planning):

Littlefish begins every engagement with a thorough needs analysis and strategy phase. We conduct deep-dive discovery workshops to capture your business goals, regulatory requirements, and pain points. Our experts perform a legacy system assessment – analysing existing CRM and ERP systems (e.g. older Dynamics CRM on-premises or legacy finance systems like NAV/GP) – to design a secure migration path to the Dynamics 365 cloud. We work closely with your team to map out current (“as-is”) vs target (“to-be”) processes, recommending an optimal Dynamics 365 solution architecture that minimises custom code and technical debt. For stalled or underperforming projects, we offer project rescue audits to identify issues and get your implementation back on track.

Outcome: a clear Dynamics 365 strategy and roadmap aligned to your objectives, with risks mitigated from the start and all stakeholders on the same page.

Solution Implementation & Customisation:

Leveraging our deep Dynamics expertise, Littlefish configures and builds the solution to fit your organisation. We follow a ‘configure-before-customise’ approach, maximising out-of-the-box Dynamics 365 CRM and Business Central features to ensure your system remains easily upgradable. Our team implements robust security controls, including fine-grained role-based access and field-level security, meeting even Official Sensitive data handling requirements (critical for public sector clients). We handle all required data migration and integration tasks – for example, connecting Dynamics 365 with your broader IT landscape such as Microsoft 365 (Outlook, Teams), SharePoint, and other line-of-business systems. If you use separate CRM and ERP applications, we can seamlessly integrate them (for instance, linking Dynamics 365 Sales with Business Central) so that customer and financial data flows freely without duplication. Throughout development, we employ modern DevOps practices for Application Lifecycle Management (using Azure DevOps for version control, CI/CD, etc.), ensuring quality and consistency from development to production.

Outcome: a robust, secure Dynamics 365 solution implemented following Microsoft best practices – fully integrated into your environment and primed for future growth with minimal technical debt.

Training & Enablement

User adoption is a critical success factor for any Dynamics 365 or Business Central project. Littlefish provides comprehensive training programmes and change management support to drive high user adoption and maximise ROI. We tailor training for different user groups – from frontline staff and power users to system administrators – to ensure everyone can use the new tools confidently. Key users are upskilled as internal ‘Dynamics Champions’, capable of handling first-line queries and basic admin tasks in Dynamics 365 and Business Central. This knowledge transfer empowers your team and reduces long-term reliance on external support. During go-live and the initial post-launch period, our experts provide hypercare support, working as an extension of your IT team to promptly address any user questions or issues. We also help develop user documentation and best-practice guides specific to your processes.

Outcome: your users and IT personnel are fully enabled to get the most out of Dynamics 365, ensuring strong adoption, productive use, and a faster realisation of benefits from the new system.

Managed Support Services (Ongoing Support)

Littlefish’s involvement continues post-deployment with our reliable managed support services to keep your Dynamics 365 applications running smoothly. We offer multi-channel support (24×7 online portal, phone, email, and chat) underpinned by strict SLAs for response and resolution times. Our dedicated support team (Level 1, 2, 3 engineers) is on hand to troubleshoot issues ranging from minor ‘how-to’ queries to critical incidents. For complex problems, we have direct escalation paths to Microsoft support to ensure rapid resolution. Littlefish follows ITIL-aligned processes, with robust incident management, problem management, and change control to protect your production environment. We also perform proactive maintenance, such as monitoring system health, applying updates and security patches, and reviewing performance logs. Clients receive real-time updates on ticket status and can participate in regular service review meetings (detailed in *Service Management* below). Our goal is to act as a seamless extension of your team, ensuring your Dynamics 365 and Business Central solutions remain reliable, secure, and up-to-date.

Outcome: peace of mind that your mission-critical CRM/ERP systems are supported by experts, minimising downtime and allowing your staff to stay focused on business operations.

Continuous Optimisation & Upgrades

Business needs and technologies evolve, Littlefish helps you stay ahead through ongoing optimisation services. We manage the evergreen lifecycle of your Dynamics 365 environment by planning and coordinating Microsoft's regular release waves (for both Dynamics 365 CRM apps and Business Central ERP). For each major update, we assess new features in a sandbox, test compatibility with your customisations, and smoothly roll out the updates to production, so you benefit from improvements with minimal disruption. We also conduct periodic health checks, reviewing system architecture, custom code, and performance metrics – to identify opportunities for tuning or enhancement. This might include cleaning up obsolete workflows, optimising SQL queries, or adjusting configurations for better throughput. As your business changes, we can extend the solution with additional modules or new integrations – for example, deploying a Power BI analytics layer or adding a Customer Portal via Power Pages. Additionally, Littlefish provides clear off-boarding and transition support if needed: we ensure you can extract all your data and documentation and even offer knowledge transfer sessions to any new internal or external team taking over.

Outcome: a Dynamics 365 and Business Central environment that remains secure, efficient, and aligned with your evolving needs over time, with all enhancements and upgrades handled proactively so your solution never falls behind.

Customer Benefits

By partnering with Littlefish for Dynamics 365 services, your organisation gains significant benefits:

Public Sector Expertise

Our team brings extensive experience working with public-sector and regulated organisations, so we understand the unique security, compliance, and accessibility requirements in these environments. We design solutions that meet government standards (e.g. GDPR, Cyber Essentials Plus) and ensure accessibility (WCAG-compliant interfaces) from the outset. This reduces risk and speeds up adoption for sectors like government, healthcare, or education, where compliance is mandatory.

Data Sovereignty & Security

Littlefish prioritises data security in every project. We ensure data residency in the UK for customers with that requirement and align to NCSC cloud security principles. Dynamics 365's cloud platform comes with robust in-built security (encryption at rest and in transit, advanced threat protection), and we augment this with best-practice configurations (like strict access controls, audit logging). Your sensitive customer and financial data is protected to the highest standards, giving you peace of mind and meeting regulatory obligations.

Scalability & Flexibility:

Dynamics 365 solutions delivered by Littlefish are built to scale effortlessly with your organisation. The Microsoft cloud architecture can support your growth from a small pilot to thousands of users enterprise-wide without significant rework. Need to expand from one department to company-wide, or introduce a new process? The modular nature of Dynamics 365 (and add-ons like Power Platform) allows new capabilities to be rolled out quickly. This scalability means your investment is future-proof – you can adapt or extend the system as your needs evolve, rather than encountering roadblocks with a rigid system.

Unified Ecosystem:

By implementing Dynamics 365 (and integrating it with tools like Office 365 and Azure), Littlefish helps you eliminate silos and create a unified digital ecosystem. For example, Dynamics 365 can be linked with Outlook for seamless email tracking, with SharePoint for document management, and even with Business Central so that your CRM and ERP share the same data. This integration ensures one source of truth for information and reduces duplicate data entry or reconciliation work. Employees spend less time switching between disparate systems and more time on productive work. Real-time data flows across your operations enable better collaboration and faster decision-making.

Mobility:

Modern Dynamics 365 applications (including Business Central) are designed with mobility in mind. With responsive web interfaces and dedicated mobile apps, your workforce can access key data and functionality on the go. Field officers can update case notes or service appointments on their tablets; managers can approve requests or view dashboards from a phone. This anytime/anywhere access to information boosts productivity and responsiveness. Even without a laptop, staff have critical customer or operational data at their fingertips, enabling more agile and informed service delivery.

Cost-Effectiveness:

Our services help drive down costs in multiple ways. By retiring outdated legacy systems and consolidating functions onto a single Dynamics 365 platform, you reduce the infrastructure and licensing overhead of maintaining multiple systems. Automation of manual processes (for instance, using Power Automate with Dynamics 365) cuts labour costs and errors. Improved data accuracy and visibility can highlight inefficiencies and save money – e.g. better insight into sales pipelines can improve forecasting and reduce wasted effort. Additionally, Littlefish's configure-first approach minimises custom development, which means lower maintenance and upgrade costs going forward. Overall, you achieve a strong return on investment through efficiency gains and IT simplification, often seeing payback as productivity rises and legacy costs disappear.

These benefits translate into tangible outcomes – faster response times in customer service, higher sales conversion rates, more efficient financial operations, and informed decision-making at all levels. With Littlefish as your partner, you not only get the technical solution but also the strategic guidance and support to ensure the solution delivers real business value.

Service Management and Governance

Deploying a solution is only the beginning; how the service is managed and governed is crucial to long-term success. Littlefish employs robust service management practices and a collaborative governance approach to ensure our Dynamics 365 services remain effective and responsive to your needs over time.

Service Reviews (Operational Oversight)

We conduct regular Service Reviews (typically monthly) with your team to evaluate ongoing service performance. These structured meetings are attended by your key IT stakeholder(s) and the designated Littlefish Service Account Manager (SAM), plus relevant technical leads. The agenda usually includes:

- **SLA Performance:** Review of support ticket metrics – volumes, response and resolution times – compared against the agreed Service Level Agreements. We highlight any breaches or trends and discuss actions to ensure SLA adherence.
- **Incident & Issue Analysis:** Discussion of any major incidents that occurred, including root cause analysis and the preventive measures taken. Recurring minor issues are also analysed to identify underlying problems (e.g. a pattern of user errors might indicate a training need).
- **System Health & Usage:** Presentation of any system health reports or usage statistics. For example, if using Dynamics 365 Customer Service, we might share insights like case volumes per week, or for Business Central, system performance metrics and transaction counts. This helps in spotting capacity or adoption issues early.
- **User Feedback and Satisfaction:** We consider any feedback from end-users or admins about the service. This might come from surveys or anecdotal input. Addressing user concerns promptly in these reviews helps maintain high satisfaction.
- **Continuous Improvement Plan:** Update on ongoing improvement initiatives. Littlefish operates a Continual Improvement Program (CIP) for our services. In each review, we propose or report progress on improvements – e.g. optimizing a workflow, refining a support process, or enabling a useful new feature. We jointly prioritise these actions for the next period.

All discussions and agreed actions from the Service Review are documented by the SAM, and we track those actions to completion by the next meeting. This ensures accountability and continuous progress. The regular dialogue keeps you fully informed and allows us to adapt the service promptly if your needs change (for instance, if you expect a surge in users or need to adjust support hours, we can plan for it in advance).

Governance Board (Strategic Alignment)

In addition to monthly operational reviews, Littlefish and the client may establish a periodic Governance Board (typically quarterly or bi-annually) for higher-level strategic oversight. The Governance Board involves senior stakeholders – for example, your department heads or project sponsors and Littlefish's senior management. Its focus is on the broader relationship and future direction:

- **Overall Service Performance:** We assess how the Dynamics 365 solutions and support services are contributing to your business outcomes. Are we achieving the expected ROI? Has there been a positive impact on KPIs (e.g. faster case resolution, increased sales, etc.)? We share success stories or major milestones and honestly evaluate any shortcomings.
- **Business Changes & Strategy:** We discuss any changes in your business strategy or organisation that could impact the service. For instance, if you plan to launch a new product line, merge with another organisation, or face new regulatory requirements, we consider how the Dynamics 365 platform and our services should adapt. This ensures the technology roadmap remains aligned with your evolving priorities.
- **Capacity & Contract Review:** The board reviews whether the current service scope and resources are suitable. As your usage of Dynamics 365 grows, we might adjust support capacity or offer additional services (e.g. more training, a dedicated on-site resource). We ensure the engagement model scales with your needs and continues to provide value for money.
- **Innovation & Opportunities:** Littlefish shares insights on relevant new technologies or features on the horizon. This could include updates on Microsoft's Dynamics 365 and Power Platform roadmap, new modules (for example, Dynamics 365 Copilot AI features), or third-party tools that could benefit your implementation. We explore opportunities to pilot innovative solutions in a safe manner. The goal is to keep you informed of what's possible and continuously find ways to enhance your operations through technology.

The Governance Board is a forum for strategic collaboration, ensuring that our partnership remains aligned with the big picture. We want to be not just a vendor but a trusted advisor, helping you plan the next phases of your digital transformation. By combining the day-to-day focus of Service Reviews with the forward-looking Governance Board, we maintain both operational excellence and strategic alignment in our service delivery.

About Littlefish

- Littlefish is an award-winning Cloud based Managed IT Services Provider. Through our capability and delivery of service excellence we have become an established and credible alternative to the 'usual suspect' large Multi £Billion Managed Service Providers and IT Outsourcers in the mid-market and enterprise.
- Our purpose is to disrupt the conventional Managed IT Services models – where the usual suspects typically fail to perform – by delivering service solutions that are tailored to the precise needs of your organisation and which are communicated in clear and straightforward language. Our people (and users) first approach delivers a higher quality experience and will add tangible business value to your organisation.

Our service solutions are designed to consider and deliver tangible outputs in terms of improved business performance. The IT experience of your users can be enhanced to promote more agility and improved quality output. Furthermore (but often overlooked), highly available, better performing IT services, with expert support on hand when it's needed to get your users working again, can engender employee health and well-being. Because of these deliverables, workforce productivity levels are increased, and it's likely that our highly attuned service model will also enable you to effect cost-efficiency gains. What's not to like!



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