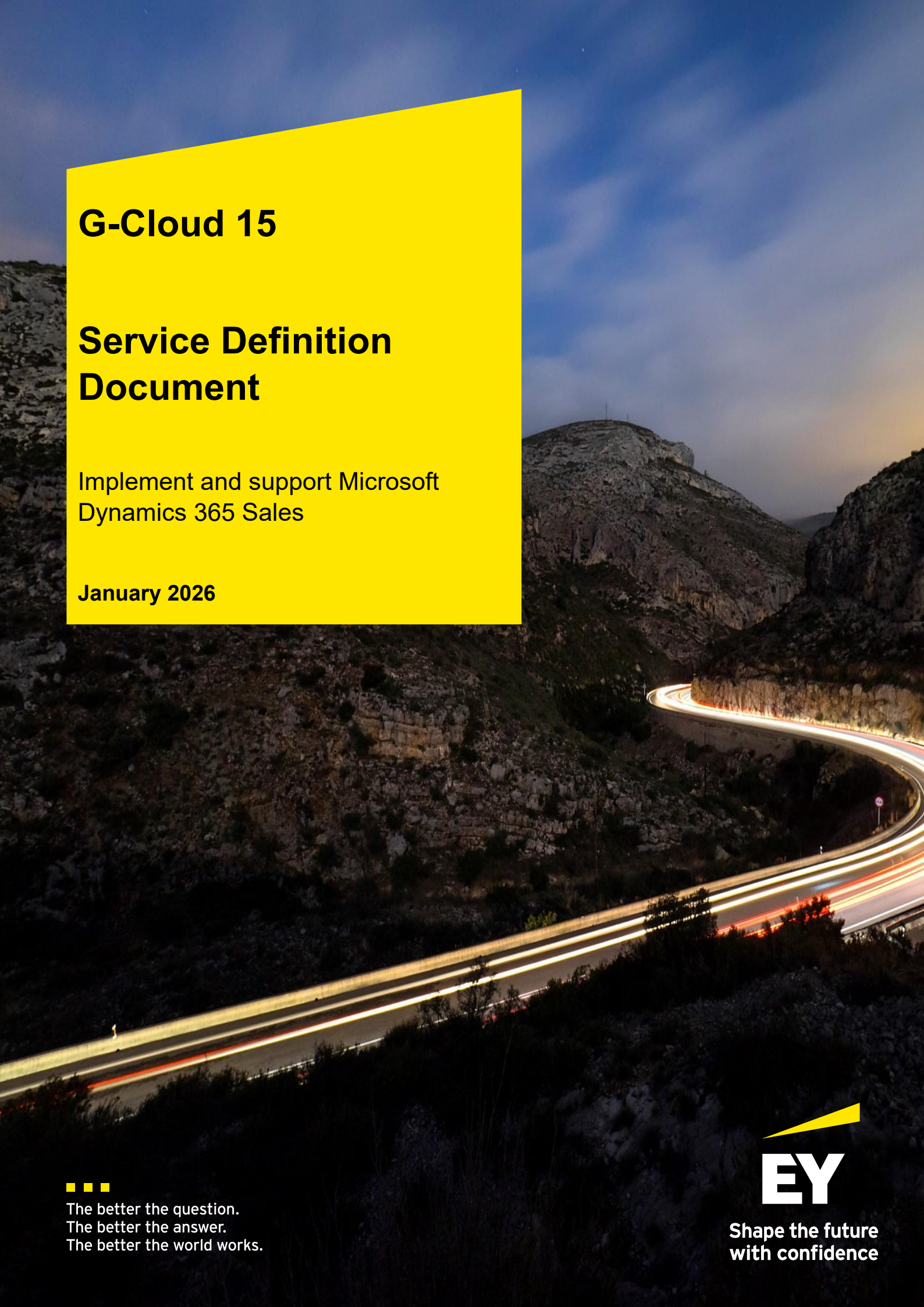




# **G-Cloud 15**

## **Service Definition Document**

Implement and support Microsoft  
Dynamics 365 Sales

**January 2026**



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The better the answer.  
The better the world works.



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# 1. Service detail

## 1.1. Service Description

EY Microsoft Services Group offers professional services for the implementation and support of Microsoft Dynamics 365 Sales, a powerful solution designed to enhance sales processes and improve customer engagement. These services are aimed at organisations seeking a reliable Microsoft technology partner to assist them in optimising their sales operations through the effective deployment of Dynamics 365 Sales. Our approach ensures that clients can seamlessly integrate this platform into their existing workflows, focusing on adopting its capabilities to drive efficiency and effectiveness from day one.

Dynamics 365 Sales provides a comprehensive view of customer interactions, enabling sales teams to access critical information and insights in real-time. This unified customer view fosters better relationships and informed decision-making. With built-in analytics and reporting tools, sales teams can track performance metrics, forecast sales trends, and identify opportunities for growth, facilitating data-driven strategies.

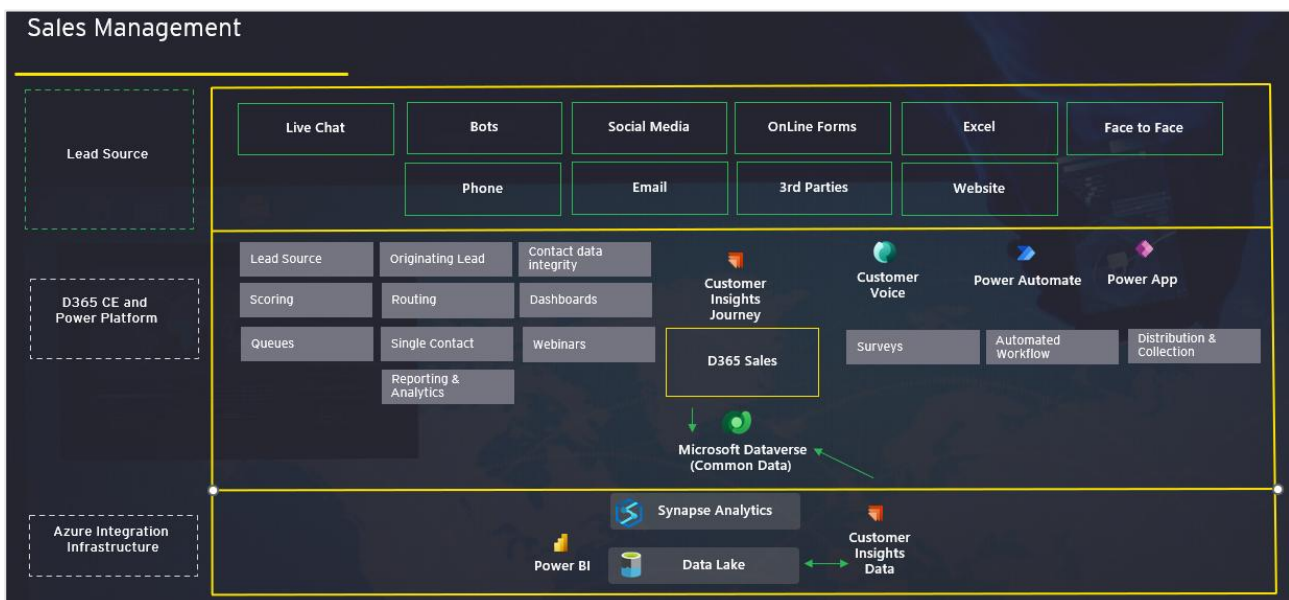


Figure 1 – D365 Sales Overview

## What are the benefits of our service

- ▶ Enhanced Customer Engagement: Provides a unified view of customer interactions, fostering stronger relationships and informed decision-making.
- ▶ Increased Sales Efficiency: Automates routine tasks, allowing sales professionals to focus on high-value activities, resulting in improved productivity and faster deal closures.
- ▶ Data-Driven Insights: Integrated analytics tools enable sales teams to monitor performance metrics, identify trends, and uncover opportunities for improvement.
- ▶ Utilise Sales Copilot: Empowers sellers with AI-driven opportunity summaries, real-time meeting support, and account insights, helping teams make informed decisions faster and respond proactively.
- ▶ Work seamlessly with Power Pages: Enables secure, branded external portals that connect directly to Dynamics 365 Sales data, supporting customer and partner self-service while streamlining sales workflows.

## Dynamics 365 Sales features

- **Unified Customer View:** Dynamics 365 Sales provides a 360-degree view of customer interactions, enabling sales teams to access critical information and insights in real-time. This unified approach fosters better relationships and informed decision-making.
- **AI-Driven Assistance:** Microsoft Copilot within Dynamics 365 Sales offers predictive insights and recommendations that help sales professionals streamline their workflows, prioritise tasks, and engage customers more effectively, enhancing overall productivity and decision-making. We can extend the out of the box Copilot's functionalities further using Copilot Studio.

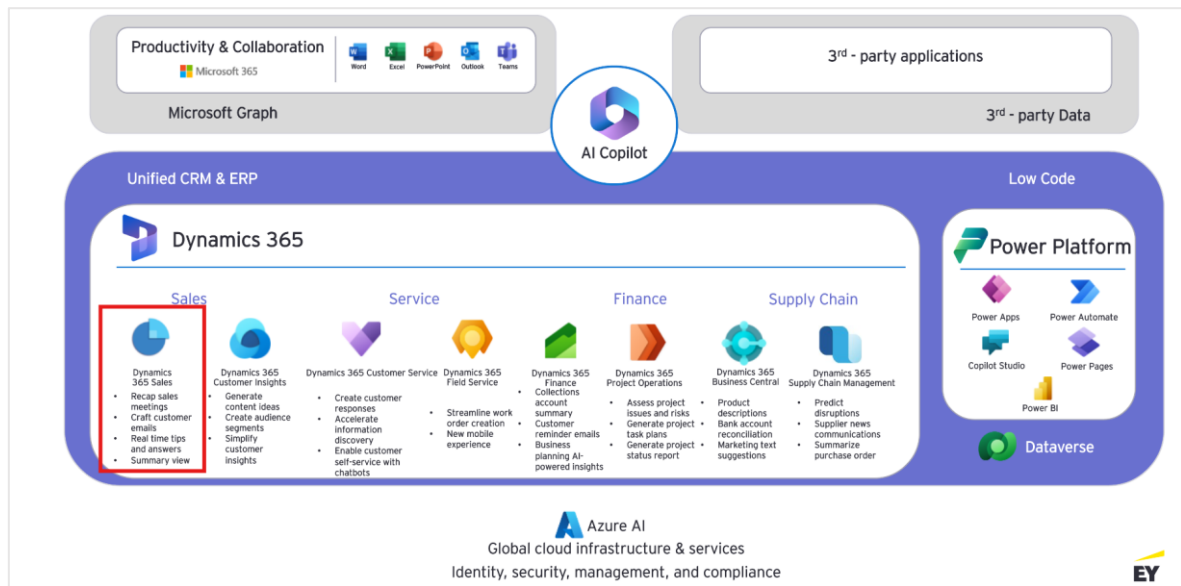


Figure 2 – D365 Features

- **Intelligent Insights:** With built-in analytics and reporting tools, sales teams can track performance metrics, forecast sales trends, and identify opportunities for growth. The out of the box dashboards and reports facilitate data-driven strategies.
- **Streamlined Processes:** The platform automates routine tasks such as lead scoring, follow-ups, and activity tracking, allowing sales professionals to focus on high-value activities. This efficiency leads to increased productivity and shorter sales cycles.
- **Integration Capabilities:** Dynamics 365 Sales seamlessly integrates with other Microsoft products and third-party applications, providing a cohesive ecosystem that enhances collaboration and information sharing across departments.
- **Power Pages for Dynamics 365 Sales:** Enables organisations to quickly create secure, branded external portals that surface CRM data (e.g., leads, opportunities, cases) to customers and partners, streamlining self-service, improving collaboration, and reducing manual workload for sales teams.

## 1.2. Engagement Approach

The EY engagement philosophy is one of open exchange which breeds mutual trust in a solutions partnership which may be expected to last many years into the future. We believe that organisations will find EY a refreshingly different technology partner, and one that acknowledges the fact that the human challenges of any major project typically outweigh the associated technical challenges.

Based upon this principle, an EY engagement is consciously one of close and regular personal interaction and focus is given to the nature, staffing and operational goals of your business over and above technology considerations. This regular, open dialogue means that our consultants can make well-informed recommendations in the specific context of an organisation. It also means that they are able to challenge assumptions and historic ways of working.

Our experienced and professional implementation teams follow an established project management methodology for both Agile or Waterfall approaches and can make recommendations on the most appropriate, based on your preference, requirements and capability. We work in partnership with you throughout all stages to ensure user adoption and measurable benefits are achieved.

## 1.3. Implementation Approach

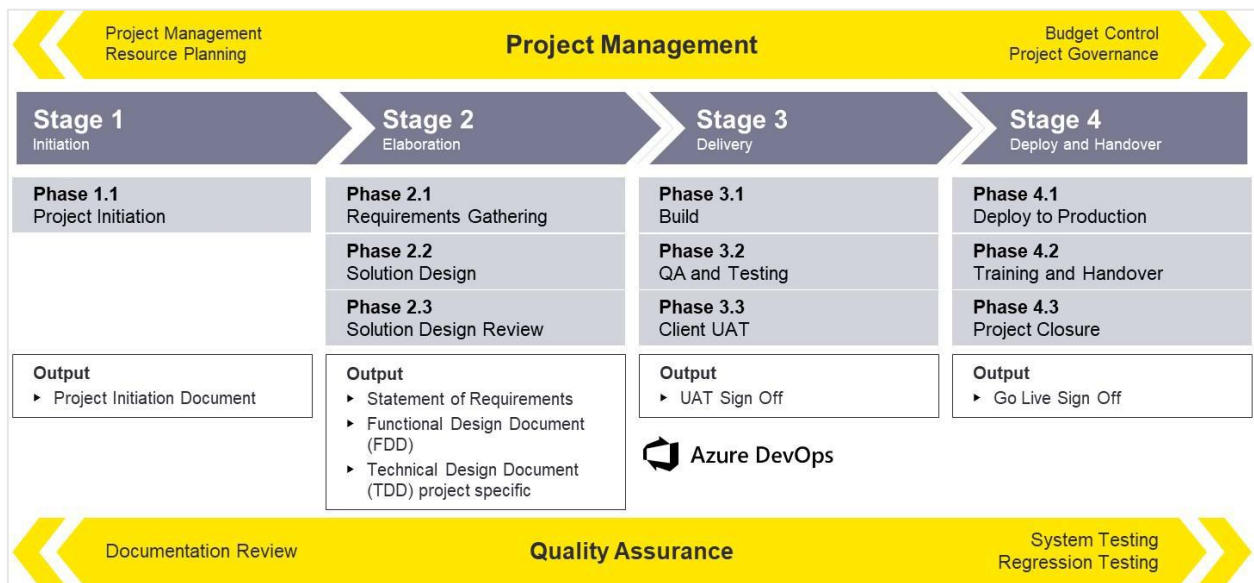
The EY approach is scalable, flexible and set on managing project constraints and expectations.

Based on client requirements, EY will employ one of two industry standard offerings: Waterfall or Agile.

| Waterfall                                                                                                                                                                                                                                                                                                                                          | Agile                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>▶ Scope and deliverables locked</li><li>▶ Time and cost more predictable</li><li>▶ Full design / technical documentation</li><li>▶ Less resource intensive for client</li><li>▶ Fully managed implementation</li><li>▶ Managed 'stages' requiring approval</li><li>▶ Full plan: start, middle, end</li></ul> | <ul style="list-style-type: none"><li>▶ Flexibility on deliverables and end goal</li><li>▶ Client Agile maturity and experience required</li><li>▶ High levels of collaboration required</li><li>▶ Dedicated resource(s) working to a fixed capacity</li><li>▶ Single Client product owner required providing direction</li><li>▶ Rapid decision making essential</li><li>▶ Configuration focus not documentation</li></ul> |

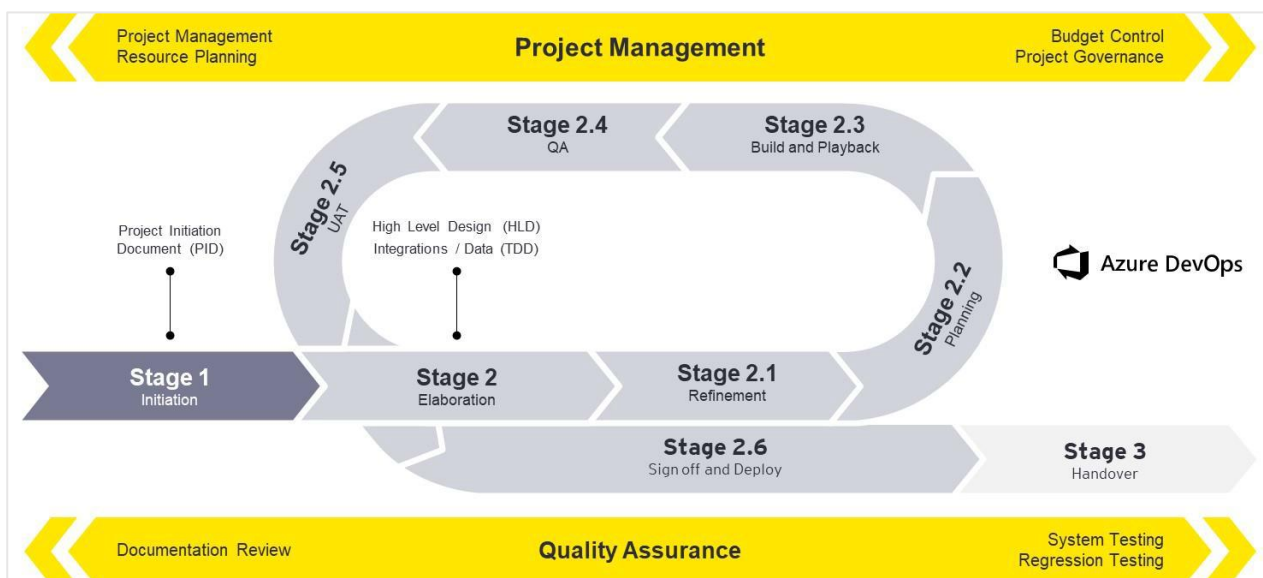
*Figure 3 – Waterfall vs. Agile Methodology*

The Waterfall approach utilises the methods and principles from the internationally recognised standard of PRINCE2 (Projects IN Controlled Environments).



*Figure 4 – Waterfall Methodology*

The Agile approach is focused around a 'Minimal Viable Product' (MVP) methodology, whereby the client dictates the priority, order and direction of the project via defined Sprints using one team. This is centred on rapid development and iterative cycles maximising configuration over development. It concentrates on working with the product(s) as much as possible over design, documentation, and specification.



*Figure 5 - Agile Methodology*

## **1.4. Client responsibilities**

### **The client is responsible for the following:**

- ▶ Acquisition of any required Microsoft application subscription licenses (which EY can advise on), to enable the service that EY will be implementing, supporting, or training the client on
- ▶ Provision of any relevant test data required by EY
- ▶ Provision of resources for User Acceptance Testing as advised by EY, and that these staff are not technical staff involved in the development, but end users/subject matter experts who were involved in the user requirements definition phase
- ▶ For any integration services to back-office applications, it is assumed that the client will have the required APIs available on all the deployed CRM instances (i.e. Development, Test, and the Production), and give EY access to any available documentation for those APIs
- ▶ Provision of equivalent instances for the relevant back-office systems and make these available at no cost to EY
- ▶ Availability of staff with detailed technical know-how in the back-office applications to input into any integration services implementation, whether from the client, or from the back-office application vendor, and have support arrangements in place with that vendor for technical support
- ▶ Provision of remote access to any relevant back-office applications as required

## **1.5. Application Support Services**

EY have a dedicated Application managed services team to support Microsoft technologies we deliver, providing seamless transition from delivery to business as usual. Our Application Managed Services empowers organisations to mitigate operational, financial, and reputational risks associated with system issues through our highly responsive issue resolution services and proactive system monitoring for Microsoft solutions.

As an extension of your team, our dedicated application support professionals collaborate closely with you to ensure that your business is always operating at peak efficiency and is consistently supported.

EY adheres to the rigorous standards of the Information Technology Infrastructure Library (ITIL), integrating ITIL best practices within our Microsoft Dynamics 365-based IT Service Management (ITSM) tool. We offer comprehensive support across the following critical areas:

- ▶ Incident and Problem Management
- ▶ Service Requests
- ▶ Change Management
- ▶ Release Management

Our processes are grounded in industry standards and continually refined over many years to ensure simplicity, clarity, and systematic execution. We are committed to transparency, sharing our approach in detail with our clients to enable effective collaboration and to ensure that we achieve mutually agreed objectives.

Moreover, our application support team assists organisations in understanding, evaluating, and implementing the latest Microsoft features, thereby maximising your technology investment and enhancing user experiences across your enterprise.

## **1.6. Support Features**

EY helps organisations reduce the operational, financial and reputational risks of any system issues, by providing highly responsive issue resolution and proactive system monitoring for Microsoft solutions. Acting as an extension of your team, we are there to make sure your business is always supported, whether you're looking to take advantage of a new feature, or if things aren't working as they were the night before. Our EY application support teams help organisations understand, assess and implement the latest features from Microsoft to increase the value of your investment and drive better experiences for your users.

### **Our support offerings at a glance:**

- ▶ Built using Information Technology Infrastructure Library (ITIL) best practice
- ▶ Fast and responsive incident resolution
- ▶ Response and resolution SLAs
- ▶ Problem management for ongoing issues
- ▶ Service request delivery
- ▶ Established co-development framework
- ▶ Service Delivery Manager to ensure service quality
- ▶ Packages tailored to your specific needs
- ▶ Quick access to Microsoft expertise and knowledge
- ▶ Continuous system insight and improvements
- ▶ Option to add additional service uplifts, such as 24/7 coverage
- ▶ On-shore-based support, with options to increase the scale and flexibility of support with off-shore or blended delivery

We have adopted a flexible approach to our support packages so that we can deliver a service tailored to suit you. We offer a range of off-the-shelf packages and bespoke support options to meet your needs. Detailed overviews of each support package and additional service uplifts are available on request.

## **1.7. Pricing**

This service is priced in accordance with the SFIA rate card provided and can be modelled using a range of commercial approaches e.g. time & materials, fixed price, etc. EY is also able to provide off-shore and near-shore pricing at reduced rates. 'Ordering and Invoicing' and 'Termination' are to be undertaken in accordance with G-Cloud 15 contract terms unless varied by mutual agreement and detailed within a call-off contract.

## **2. EY Microsoft Alliance**

The EY organization leverages Microsoft technology to create transformative solutions across its service lines, including Assurance, Tax, Consulting and Strategy and Transactions. These solutions empower clients to achieve significant transformational outcomes, enhancing their agility, fostering innovation and equipping them to effectively respond to disruptions.

- ▶ Data and Artificial Intelligence (AI) capabilities that drive business-led transformation with humans at center
- ▶ Repeatable enterprise solutions that help enable key business functions
- ▶ Sector-led solutions that address industry challenges

The EY-Microsoft Alliance designs and helps deliver transformative cloud solutions powered by business ingenuity that helps create long-term value. The EY organization and Microsoft bring a compelling formula to spark the potential of the cloud and unlock the power of data. We solve clients' most challenging issues by blending trusted industry knowledge with innovative cloud technology. This strategic relationship draws on decades of success developing visionary solutions that provide lasting value. Together, we empower organizations to create exceptional experiences that help the world work better and achieve more.

### **Recent awards**

- ▶ 2025 Microsoft Global Advisory Services Partner of the Year – 6th consecutive year
- ▶ 2025 Microsoft Global Sustainability Changemaker Partner of the Year – 3rd consecutive year
- ▶ 2025 – Global SI – Finalist
- ▶ 2025 – Global – Dynamics 365 Service
- ▶ 2025 – Intelligent Automation – Finalist
- ▶ 2025 – Dynamics 365 Finance – Finalist

### 3. Key contacts

For further information please get in touch via the email address below.



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## EY | Building a better working world

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