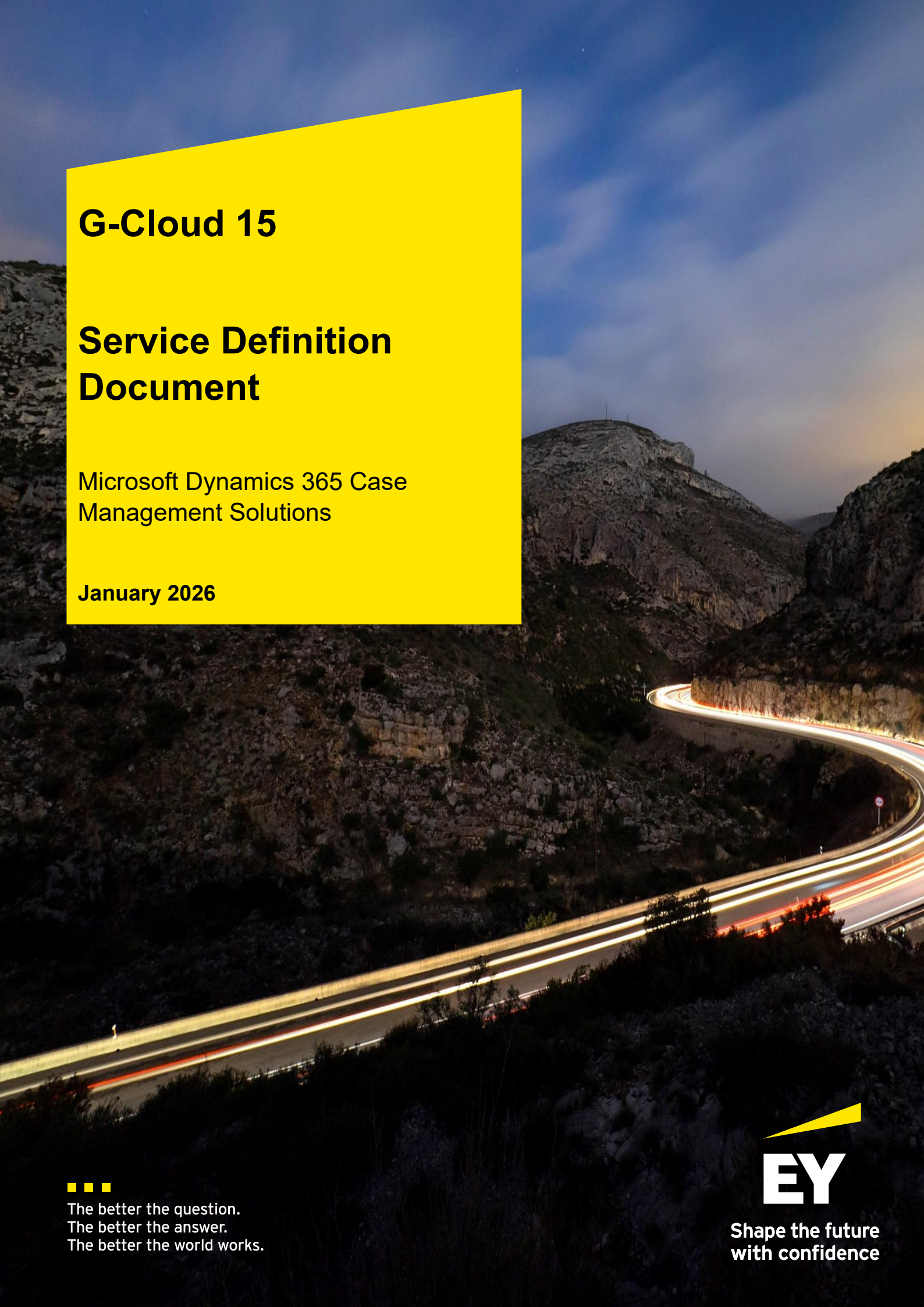




# G-Cloud 15

## Service Definition Document

Microsoft Dynamics 365 Case Management Solutions

January 2026



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The better the answer.  
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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 Case Management; a robust solution designed to streamline customer service operations and enhance case resolution processes. These services are aimed at organisations seeking a trusted Microsoft technology partner to assist them in optimising their case management workflows through the effective deployment of Dynamics 365 Case Management. Our approach ensures that clients can seamlessly integrate this platform into their existing operations, focusing on adopting its capabilities to drive efficiency and improve service delivery from day one.

Dynamics 365 Case Management provides a comprehensive view of customer cases, enabling service teams to access critical information and insights in real-time. This unified case view fosters better customer relationships and informed decision-making. With built-in analytics and reporting tools, case managers can track performance metrics, identify trends, and uncover opportunities for improvement, facilitating data-driven strategies.

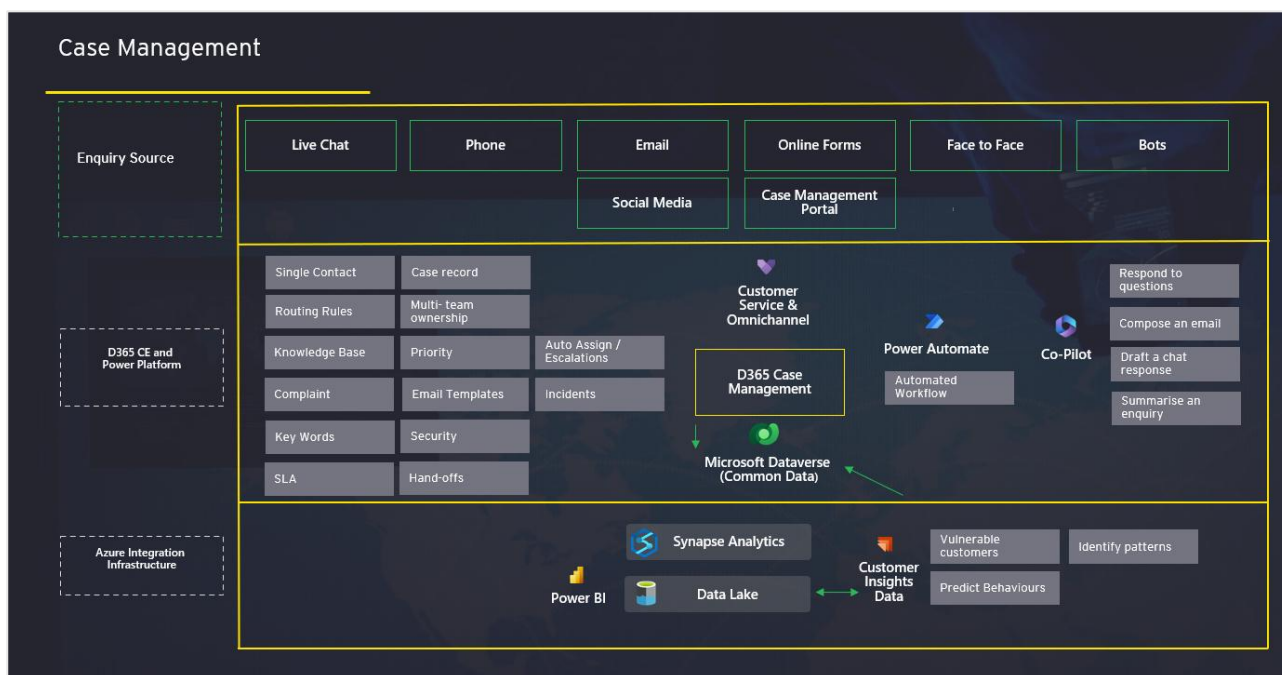


Figure 1 - D365 Case Management Overview

The integration of AI capabilities within Dynamics 365 Case Management enhances user experience by offering predictive insights and recommendations. Microsoft Copilot empowers case managers to efficiently prioritise cases, automate routine tasks, and enhance customer interactions, ultimately improving response times and service quality. Additionally, the platform automates routine tasks such as case assignment, follow-ups, and escalation management, allowing service professionals to focus on high-value activities, leading to increased productivity and faster case resolution.

Figure 2- Enquiry form in D365.

Enquiries can be classified by subject for reporting and search purposes allowing front line users and management to see which subjects arise most often and which previous responses provided for similar enquiries can help with supporting the ongoing performance of Enquiries. Using this intelligence, it would allow Customers to create more relevant and instructive FAQs in the portal, which in turn, may reduce the number of enquiries submitted by enabling applicants to easily self-serve common information they are seeking.

Another standard feature, Service Level Agreements, would be implemented to allow internal users to have an allocated timeframe to respond to, or resolve, the enquiry. This is particularly useful for ensuring all enquiries are dealt with in a timely manner. By using workflow automation to trigger escalations and notifications to users based on the SLA's, dashboards can help visualise those enquiries that are nearing deadlines and need to be actioned.

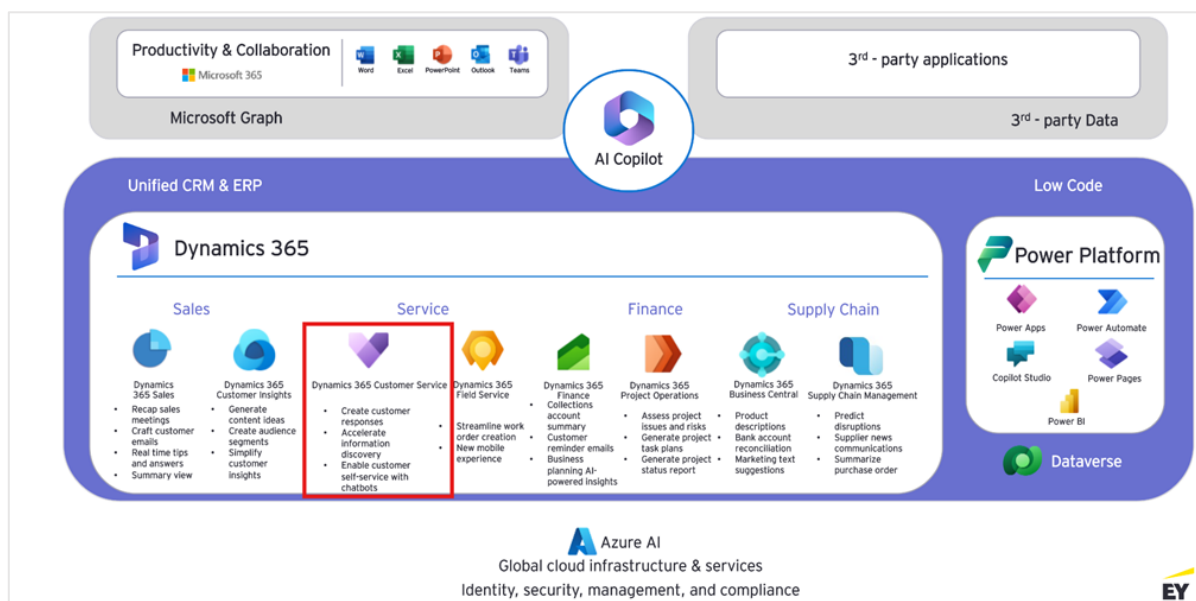


Figure 3 – D365 Features

Integrating Power Pages with Dynamics 365 Case Management allows organisations to create a user-friendly portal where customers can monitor their cases, update information, and cancel requests as needed. This self-service capability empowers users by providing them with real-time access to their case status and relevant information, enhancing transparency and engagement. By facilitating direct communication and updates, organisations can improve customer satisfaction and reduce the workload on service teams, leading to more efficient case management overall.

Using the portal, the enquirers would be able to view the status of their enquiry via pre-configured views which would be used to surface D365 Enquiry data. As the Enquiry transitions through different stages, the view would reflect this. EY recommends implementing Workflows and Power Automate flows to alert internal members of the Enquiries team when certain points in the process are reached, such as an escalation. EY would work with the clients to ascertain the different scenarios that arise within the enquiry management process, and which areas need to be automated to provide the most benefit to agents and applicants.

Implementing and supporting Dynamics 365 Case Management with EY ensures that organisations can fully realise the potential of the platform while benefiting from the intelligent capabilities of Copilot. Our dedicated team of experts is committed to delivering a tailored solution that drives service excellence and fosters sustainable growth. As market leaders, EY and Microsoft are uniquely positioned to empower organisations and support governance with leading practices.

### **What are the benefits of our service**

- ▶ **Enhanced Customer Satisfaction:** Streamlined case resolution processes lead to quicker responses and improved customer experiences.
- ▶ **Centralised Case Information:** All case-related data is stored in one location, making it easy for teams to access and manage information.
- ▶ **Automated Workflows:** Reduce manual tasks through automation, increasing efficiency and allowing staff to focus on higher-value activities.
- ▶ **Real-time Insights:** Dynamic dashboards provide actionable insights into case metrics, helping teams make informed decisions.
- ▶ **Improved Collaboration:** Facilitates teamwork across departments with shared visibility into case statuses and responsibilities.
- ▶ **Scalable Solutions:** Adapts to the needs of organisations of all sizes, from small businesses to large enterprises.
- ▶ **Regulatory Compliance:** Helps ensure adherence to industry regulations and standards in case management practices.
- ▶ **Customisable Processes:** Tailor workflows and case management processes to fit specific organisational needs and requirements.
- ▶ **Data-Driven Decision Making:** Leverage analytics to identify trends and improve case handling strategies.
- ▶ **Integration Capabilities:** Seamlessly connects with other Microsoft Dynamics 365 applications and third-party systems for enhanced functionality.

## **Our service features**

- ▶ **Case Tracking:** Monitor the status and progress of cases in real-time, ensuring timely resolutions.
- ▶ **Multi-channel Support:** Manage cases from various channels, including email, phone, and chat, in a unified platform.
- ▶ **Knowledge Base Integration:** Access a centralised repository of information to assist in case resolution and improve efficiency.
- ▶ **Customisable Dashboards:** Create personalised dashboards to visualise key performance indicators and case metrics.
- ▶ **Automated Notifications:** Set up alerts and notifications for case updates, ensuring stakeholders are informed promptly.
- ▶ **Collaboration Tools:** Built-in tools for team collaboration, including comments and task assignments within cases.
- ▶ **Reporting and Analytics:** Generate detailed reports on case performance, trends, and team productivity.
- ▶ **Role-Based Access Control:** Ensure data security and compliance with customisable user permissions and access levels.
- ▶ **Mobile Access:** Enable case management on-the-go with mobile access, allowing teams to respond to cases anytime, anywhere.
- ▶ **API Integration:** Utilise APIs to connect with external systems and enhance case management capabilities.

## **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 collaboratively with you throughout all stages to ensure user adoption and measurable benefits are achieved.

## **1.3. Implementation Approach**

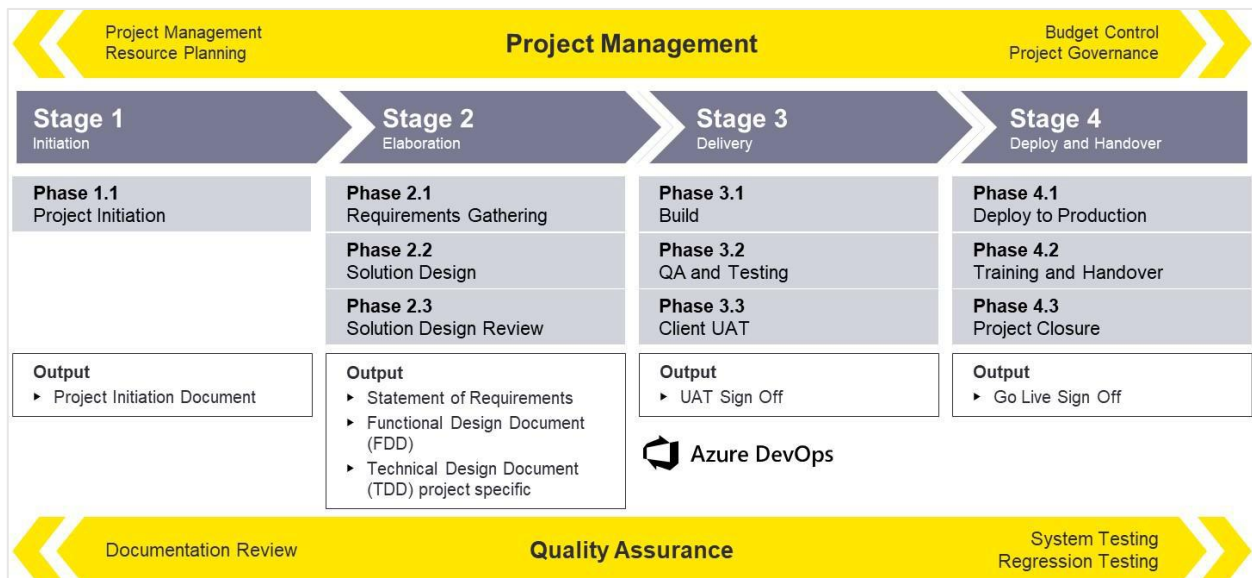
The EY approach is scalable, flexible and set on managing project constraints and expectations.

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 4 - Waterfall vs. Agile Methodology*

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



*Figure 5 - 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.

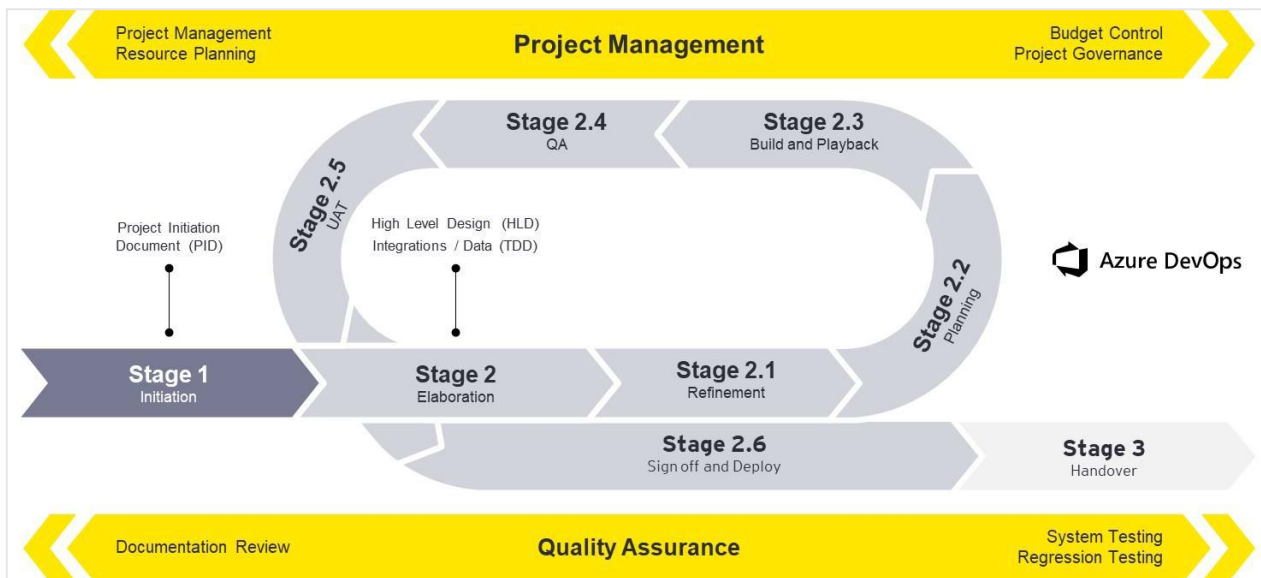


Figure 6 - Agile Methodology

#### 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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