

Dynamics 365 Field Service Center of Excellence: 8-week implementation

Rapid implementation of Microsoft Dynamics 365 Field Service to optimize service operations, enhance customer satisfaction, and improve operational efficiency through swift deployment, integration, customization, training, and support.



Business contexts

Peripheral and core automation

Enterprise architecture



Value from technology



Services verticals

- Construction (EPC/AEC/Realty)
- Energy, utilities, and infrastructure
- Professional services
- Manufacturing
- Education and non-profits



Representative solutions

- Customer engagement
- Work and operations management
- Leveraging data

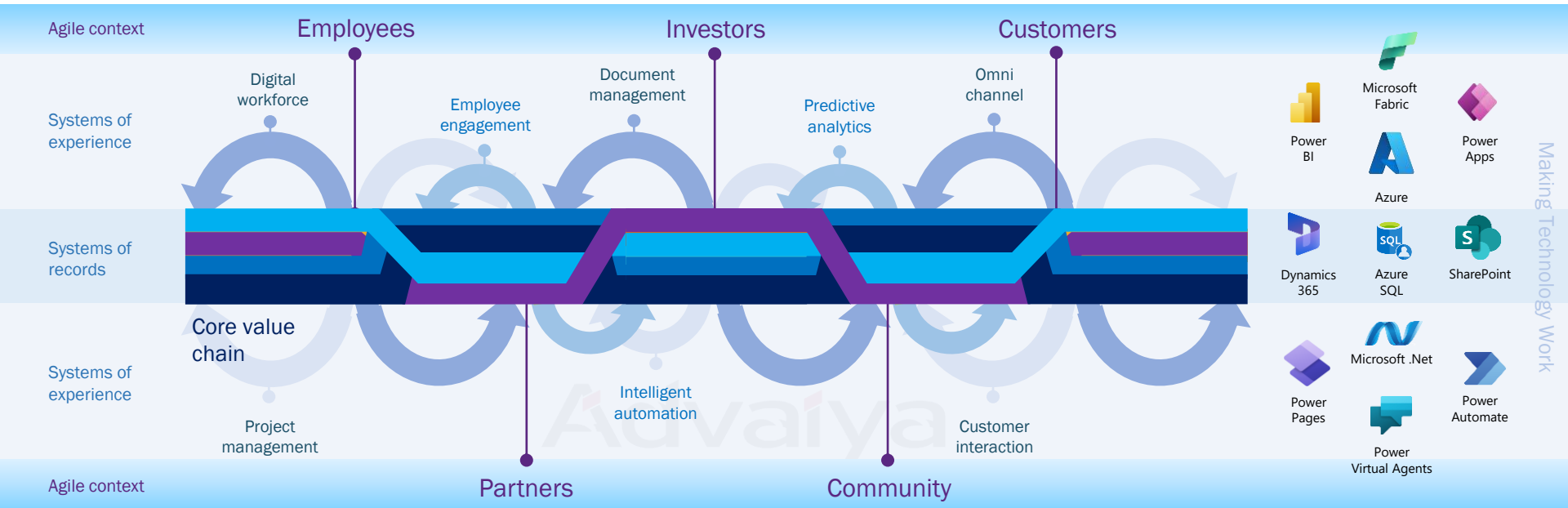


Technology expertise

- Business Applications
- Data & AI
- Cloud

Peripheral automation

- Accelerate the digital transformation journey with minimum distraction and disruption.
- Scale and adapt to changes in core systems
- Robust, reliable core systems with agile elements
- Optimize workflows and reduce manual tasks
- Break down silos and encourage team involvement
- Work with new tech and AI innovations



Making technology work

Realizing value

- **Enterprise architecture-based** core and peripheral automation
- Rich repertoire of **intellectual assets**
- **AI-enabled** teams and development
- **Comprehensive decomposition** of business needs and technical execution steps
- Robust **talent management**

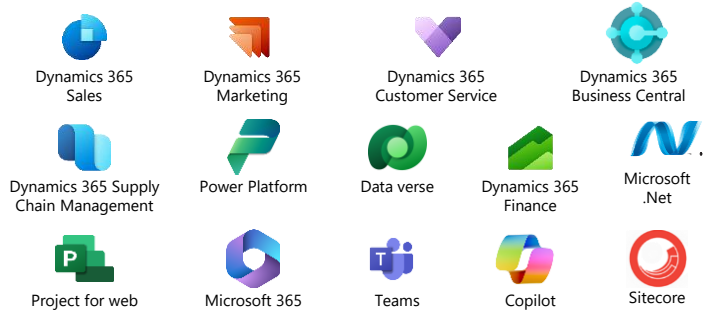


Driving benefits

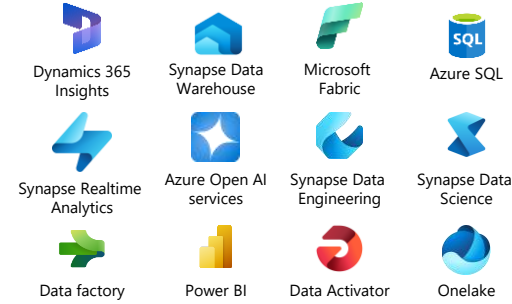
- **Reliable** project execution and delivery
- Faster and deeper **technology adoption**
- **Better value** from existing technology investments
- **Extensibility** and **upgradability**
- **Accelerated digital transformation journey** with minimum distraction and disruption.

Advaiya expertise and engagement areas

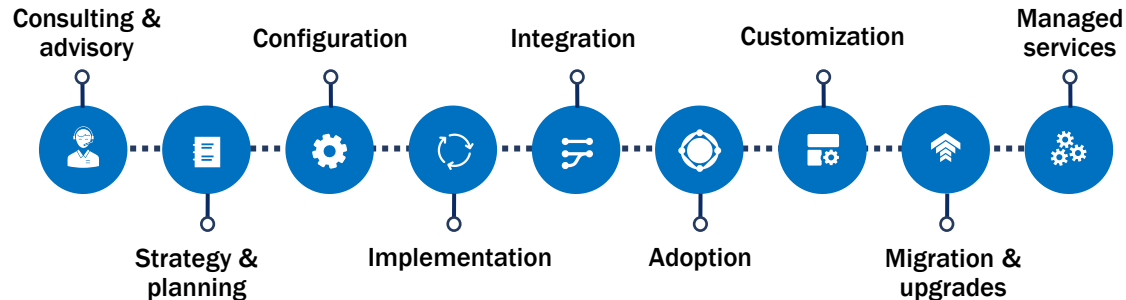
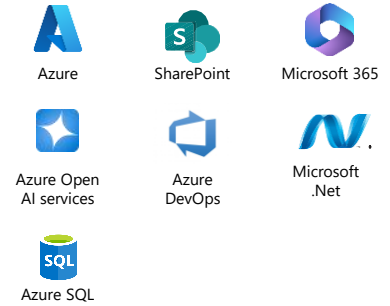
Business applications



Data & AI



Cloud





Field Service Center of Excellence: 8-week implementation

Advaiya Solutions offers a streamlined and efficient implementation of Center of Excellence for Microsoft Dynamics 365 Field Service tailored to meet your organization's service management needs. This comprehensive solution enables you to optimize service operations, enhance customer satisfaction, and improve operational efficiency within a concise timeline of 8 weeks.

Deliverables

- Customized Microsoft Dynamics 365 Field Service solution.
- Integrated and tested system.
- Trained staff and user documentation.
- Post-implementation support.

Advaiya's approach to define D365 Field Services Center of Excellence

Challenges

- The absence of clear usage guidelines for Dynamics 365 Field Services can lead to potential misuse and the proliferation of difficult-to-manage applications.
- We need governance, operational, and monitoring services to ensure structured scaling, adoption, and consolidation of Dynamics 365 Field Services.
- Involving and collaborating with business users is crucial for fostering the expansion and acceptance of Dynamics 365 Field Services.

Ideal Solution

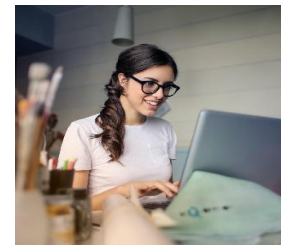
- A comprehensive Center of Excellence (CoE) readiness assessment will help develop a playbook for both IT and business users.
- Our CoE assessment consulting service aids in the strategic design of a Dynamics 365 Field Services Center of Excellence (CoE). This process involves thorough considerations of enterprise architecture, security, IT controls, and the organization's operating model.
- Our consulting service assists in developing a training plan tailored for businesses, with a "train first and build next" approach.

Desired Outcomes

- Establish clear role ownership to strike a balance between independence and responsibility.
- Establish and maintain reliable governance processes and controls.
- Provide solutions and services efficiently and promptly, maintaining a competitive cost structure.
- Facilitate collaboration and harness the most up-to-date tools and technologies.
- Ensure the platform environment's integrity and availability in accordance with IT standards and policies.

Features

- **Rapid deployment:** Swift setup and configuration of Microsoft Dynamics 365 Field Service within 8 weeks.
- **Core functionality implementation:** Includes essential features such as work order management, scheduling, resource optimization, and mobile access.
- **Integration support:** Integration with existing systems or other Microsoft products as needed.
- **Customization options:** Basic customization to align with specific business processes and requirements.
- **Training and support:** Comprehensive training sessions and ongoing support to ensure smooth adoption and utilization of the solution.



Field Service innovation center

- The Field Services Team defines the vision, scope, and objectives, followed by installing the CoE starter kit. The team raises awareness and boosts the adoption of Dynamics 365 Field Services by assessing current environments, identifying gaps, setting up governance models, and establishing a community within your organization.
- This includes workshop sessions such as 'Field Service in a Day, driving use case development for unexplored scenarios conducting training sessions and setting up environments.
- The group envisions and develops new use cases, crafts a detailed roadmap aligning with business priorities, and nurtures an internal app developer community for continuous expansion.





Benefits

- **Time efficiency:** Quick deployment ensures rapid realization of benefits and return on investment.
- **Enhanced service management:** Streamlined service operations lead to improved service delivery and customer satisfaction.
- **Scalability:** Foundation laid for future scalability and growth with Dynamics 365 Field Service.
- **Cost effectiveness:** Optimized implementation timeline minimizes disruption and associated costs.



Field Service Center of Excellence

8-week implementation

Week 1: Discovery and planning

- **Kick-off meeting:** Introduce teams, outline project scope, goals, and timeline.
- **Requirement gathering:** Detailed sessions to understand current processes, pain points, and specific needs.
- **Solution design:** Develop a tailored solution design and implementation plan.

Week 2-3: System configuration

- **Platform setup:** Install and configure Microsoft Dynamics 365 Field Service.
- **Data migration:** Import existing data into the new system.
- **Customization:** Configure workflows, user roles, and permissions based on the requirements.

Field Service Center of Excellence

8-week implementation

Week 4: Integration

- **System integration:** Integrate with existing ERP, CRM, and other relevant systems.
- **Testing:** Conduct integration testing to ensure seamless data flow and process alignment.

Week 5-6: Training and user acceptance testing (UAT)

- **Training:** Conduct comprehensive training sessions for end-users and administrators.
- **UAT:** Facilitate user acceptance testing to validate the system against business requirements.

Field Service Center of Excellence

8-week implementation

Week 7: Go-live preparation

- **Final adjustments:** Make any final adjustments based on UAT feedback.
- **Go-live plan:** Develop and finalize the go-live plan, including cutover activities and risk mitigation strategies.

Week 8: Go-live and post-implementation support

- **Go-live:** Execute the go-live plan and transition to the new system.
- **Support:** Provide on-site and remote support to address any immediate issues and ensure smooth operation.
- **Review:** Conduct a project review meeting to assess success and identify any follow-up actions.

Dynamics 365 Field Service Center of Excellence

Continuous engagement (ongoing)

This structured approach establishes a comprehensive governance model that supports ongoing development, compliance, and effective use of the D365 Field Service.

Advaiya team

- **Solution Architect:** Specialists guiding the setup and customization of solution.
- **Engagement Manager:** Manages project schedules, deliverables, and team coordination.
- **Quality Engineer** (as applicable): Ensures that updates meet the required standards of quality, reliability, and performance.

Governance structure components

- CoE roadmap monitoring
- Ensure compliance
- Implement best practices
- Processes and testing
- Management of environment
- Review sessions
- Library of reusable components
- Training and development
- Idea generation sessions

Client's team

- **CoE lead:** leader ensuring alignment with business objectives.
- **Business users:** Specialists providing insights and requirements based on business needs.
- **Quality Engineer** (as applicable): Ensures that products meet the required standards of quality, reliability, and performance.

Our presence

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The Advaiya advantage



Project management

- Comprehensive decomposition of business needs and technical execution steps
- Integrated opportunity, project, backlog, and performance management.
- Kanban based tracking



Enterprise architecture

- Platform best practices for extensibility and upgradability
- Utilizing existing tech investments
- Peripheral automation approach and phased execution



Quality processes

- Process checks and metrics
- Audits (internal and external)
- Release management



AI enabled

- Team members trained on latest AI tools
- Active incorporation and embedding of AI based use cases in solutions



Talent management

- Right teams for the right projects
- Team continuity and seamless handover
- Scalability on demand



Intellectual assets

- Growing library of accelerator components
- Comprehensive leverage of Microsoft learning and certification program
- Comprehensive CPE program