



RAPID RESULTS

Dynamics 365 for Field Service





DREAM **BIG**
START **SMALL**
DELIVER **FAST**



RAPID RESULTS

We have developed 'Rapid Results' offering to enable our clients to take advantage of the core 'out of the box' capabilities of Dynamics 365 for Field Service, to deliver immediate results and to provide a platform upon which additional capabilities can be added in the future. All this can happen within a short timeframe at a fixed cost, and without the risk associated with a lengthy and complex implementation.

Following recognised industry best practice, Rapid Results focuses on delivering the base capability in the first stage of a Customer Engagement project. This approach provides a platform for future improvements, allowing additional capabilities and customisations to be added as needs require.

8-week duration

\$96,000 (ex. GST) fixed cost

OBJECTIVE

Enhance your organisation's remote workforce capabilities with Dynamics 365 Field Service to deliver exceptional and consistent experiences.

"There are no traffic jams along the extra mile"

Roger Stauchbach





DELIVER PERSONALISED AND CONSISTENT EXPERIENCE



Work Orders

Plan, schedule, dispatch and monitor customers jobs as they are in-flight.



Schedule Board

Empower dispatchers to search resources and book jobs through an easy to use, drag and drop interface.



Resource Management

Configure People and Equipment with skills and certifications as well as define a proficiency model for each resource.



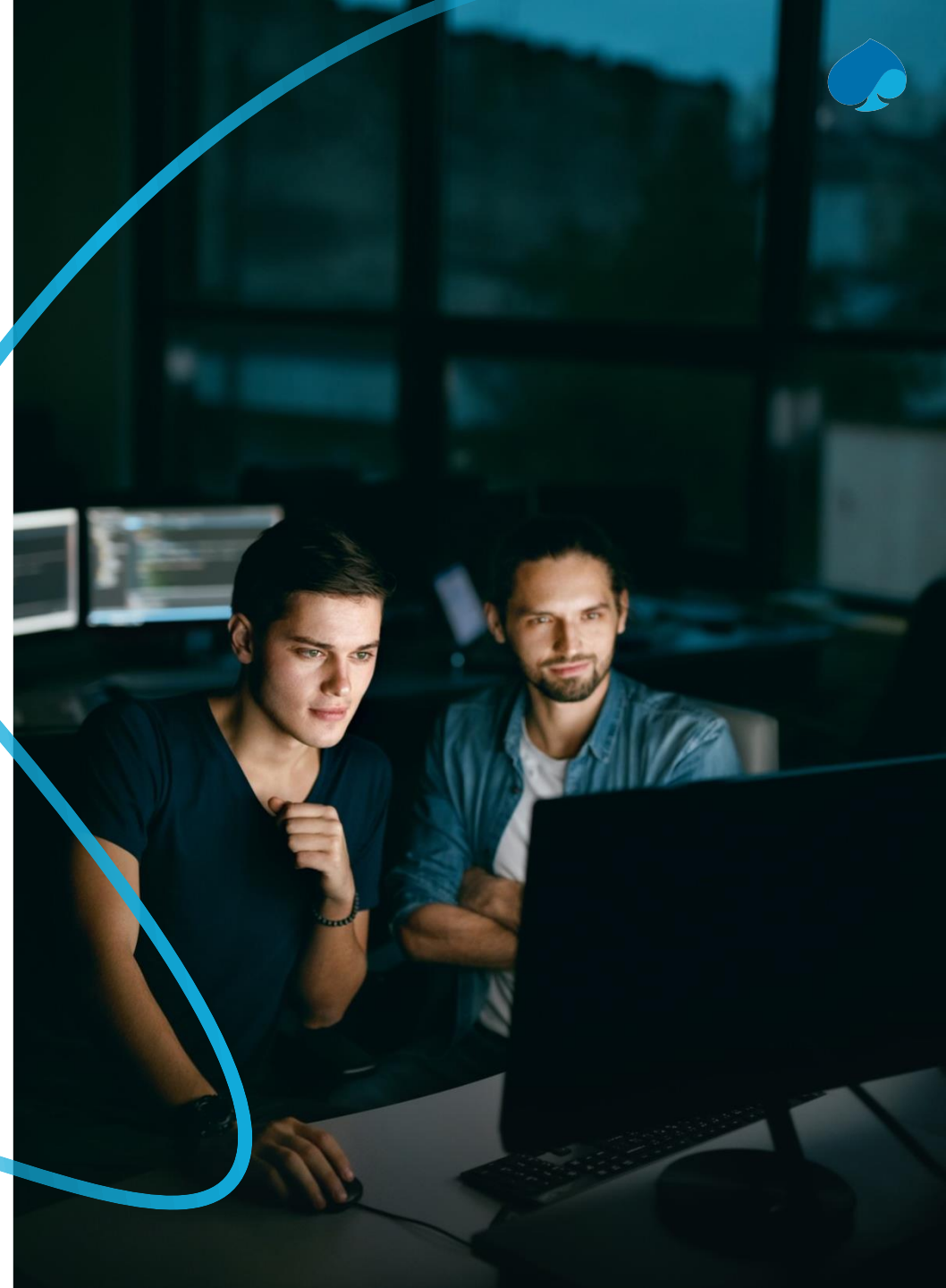
Automation

Built in automation with agreements and incident types enabling dispatchers to easily create work order off templates.



Field Service Mobile

Enable your remote workforce to receive, update and complete work instruction. Supports online and offline modes.



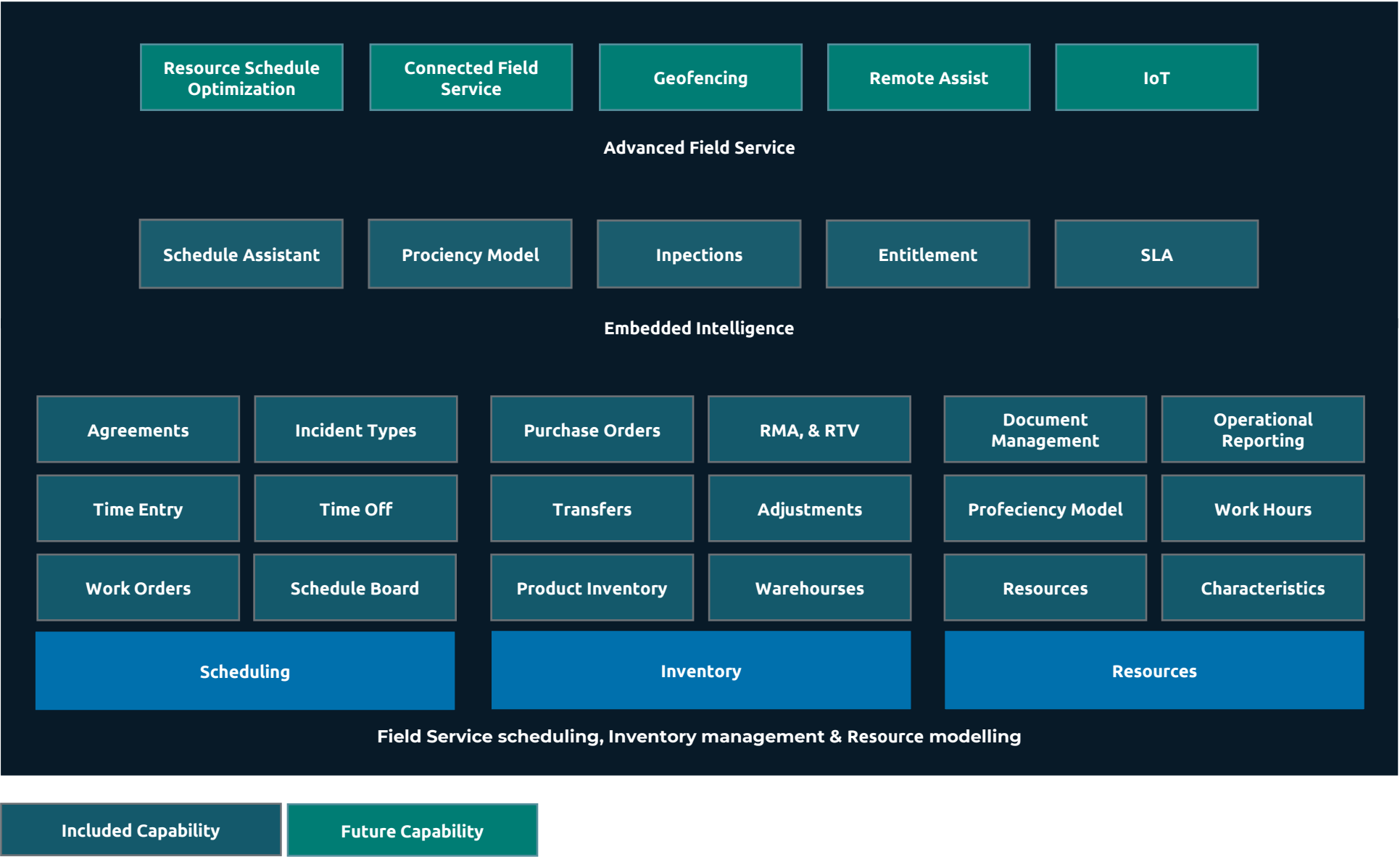
Field Service Capability



Intelligence and
Insights



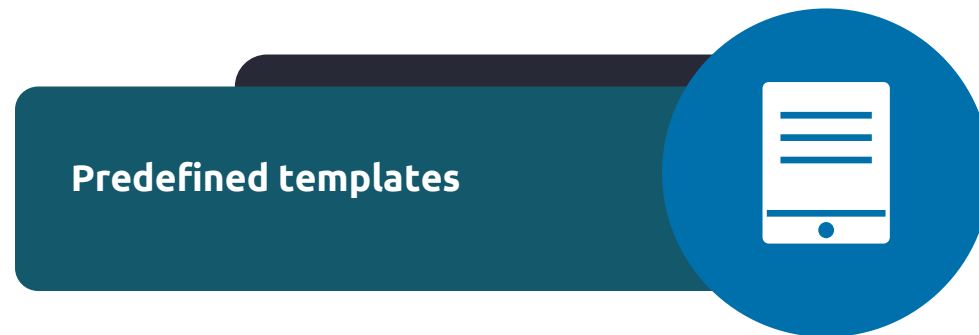
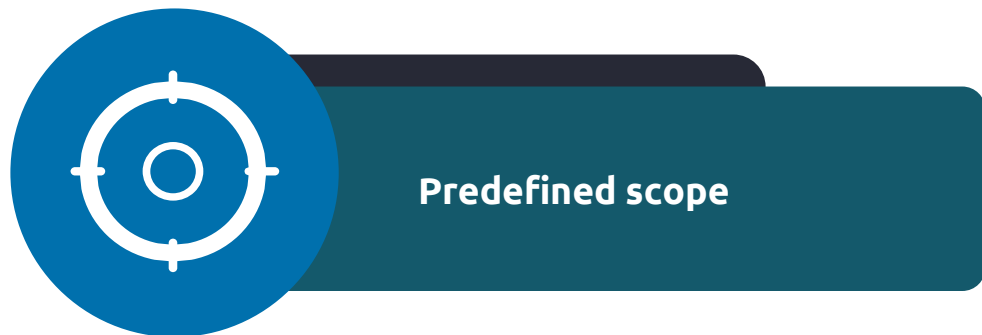
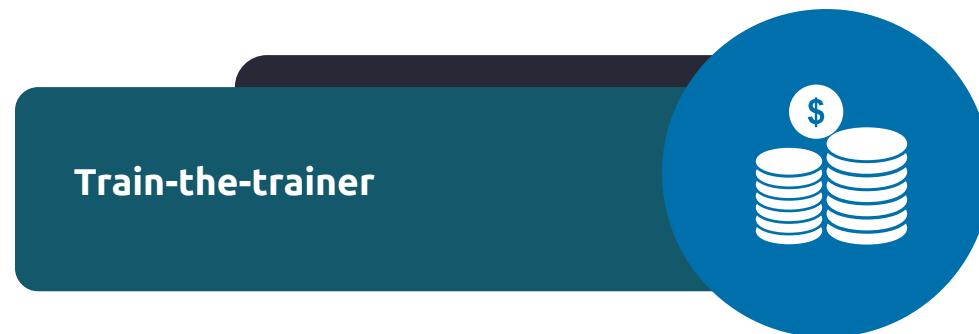
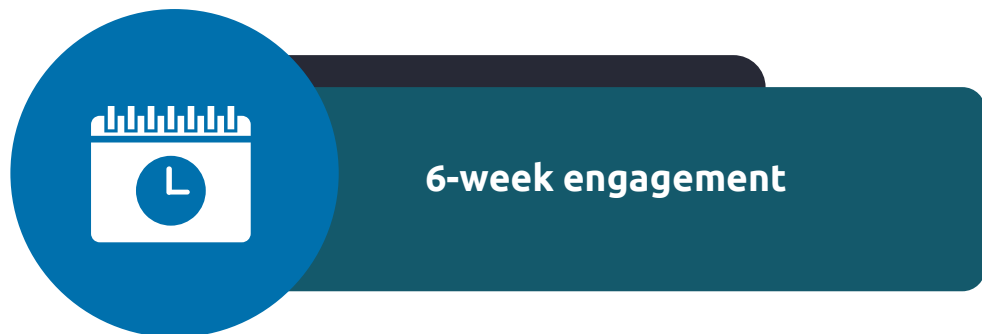
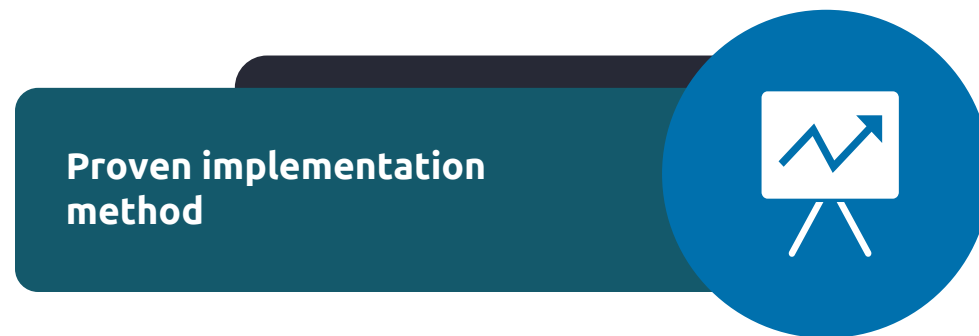
Dynamics 365
Field Service





PROJECT CONSTRUCT

OUR APPROACH



PROJECT TIMELINE



Kick-off and Analysis

Kick-Off

Workshops & Fit Gap

Playback

Build

CONFIGURE

Test data import

Deploy

Train-the trainer

UAT

Go Live

Go Live

Go Live Support

Project Management



PROJECT SCOPE

Rapid Results deployment of Dynamics 365 for Field Service

- High-Level Workshop to understand the base Field Service requirements.
- Setup of Out of the Box (OOTB) functional areas related to Work Orders, Resources and Inventory.
- Update of the OOTB Work Order business process
- Add an additional 10 custom fields to Work Orders
- Configuration of 5 automated workflows (up to 8 steps each) across the functional areas.
- Data import using Standard import templates for Accounts, Contacts and Products
- Project management and prioritisation with your team on the configurations required to the base solution.

Configuration included

- Resource setup
- Products setup
- SLA Configuration (up to 1 for Case and 1 for Work orders)
- Templates for Quotes, Invoices and Work Orders using Microsoft Word (up to 1 template for each)
- Import PowerBI Field Service Report supplied by Microsoft.
- Configure mailbox's and server-side sync for up to 10 users
- Configure 2 agreements
- Configure up to 5 incident types
- Deploy OOTB Field Service Mobile without offline operation



INCLUSIONS

■ Base configuration

- Enable Auditing and requirements (up to 5 entities), duplicate detection rules (up to 10 simple rules)
- Security Roles & Business Units

■ Field Service Configurations

- Initial Field Service setup
- Resource Setup (People & Equipment)
- Product & Service import and setup
- Configure 1 SLA and associated KPI's, Configure 2 Agreements (Repeatable services for automated job creation) and Configure 5 Incident Types (Job templates)
- Create up to 5 custom workflows
- Field Service mobile OOTB setup (Excluding offline profiles)
- Create 1 Word template for a Job Report

■ Sales Configurations:

- Create 1 quote word template
- Create 1 invoice template

■ Dashboard & Reporting Configuration:

- Power BI connector pack (OOB)
- D365 Field Service dashboard (OOB, up to 2 simple dashboards)

■ Data Migration

- Importing of Accounts, Contacts and Products supplied by your team in a templated format defined by us.

■ Train-the-trainer

- Training of key users will be done via a train the trainer style approach with standard training materials and with the objective of having super users trained up to deliver training to the rest of the business.

■ Deployment & Go-Live

- User Acceptance Testing support (8 hours timeboxed)
- Deployment to Production
- Go-Live Support (4 hours timeboxed)
- Post implementation review and planning of future enhancements and opportunities

■ Assumptions

- Capgemini to be nominated as Claimed Partner of Record (CPoR) for Dynamics 365 and Power Platform.
- Capgemini to be nominated as Digital Partner of Record (DPoR) for Microsoft subscriptions.

■ Constraints

- Project deliverable will only include a Production ready solution.
- Only 2 instances (Sandbox & Production) will be configured.



EXCLUSIONS

- Deployment (including training and configuration) of other functional areas that are not specifically mentioned in the inclusions section above e.g., Sales, Marketing, Customer Service or other Business Application components.
- Integration to external systems (This will be viewed as a potential Future Phase).
- Installation and configuration of third-party products.
- Development of reports and web resources.
- Setup of Quotes, Orders and Invoices will be limited to configurations, Customisations or custom development for complex quoting and pricing mechanism is excluded from the scope of this project.
- Setup and configuration of SharePoint, except for enabling the standard Out of the Box Server-Side Integration and Document Management.
- Setup and configuration of Exchange Online or Office 365, except for the enabling of Out of the Box Server-Side Integration with either Exchange On-Premise or Exchange Online.
- Customisations including custom development, custom scripts, plugin and Azure development are excluded from the scope of this project.
- Configuring of offline profiles for field service mobile
- The following aspects of data migration and import:
 - Data cleansing (this is your responsibility).
 - Extracting data from existing systems (this is your responsibility).
 - Populating Templates with extracted data.
 - Any modification to the standard upload templates.
 - Resolving Data Issues found upon import.



**GET THE
FUTURE
YOU WANT**



About Capgemini

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