Columbus Presentation

2020

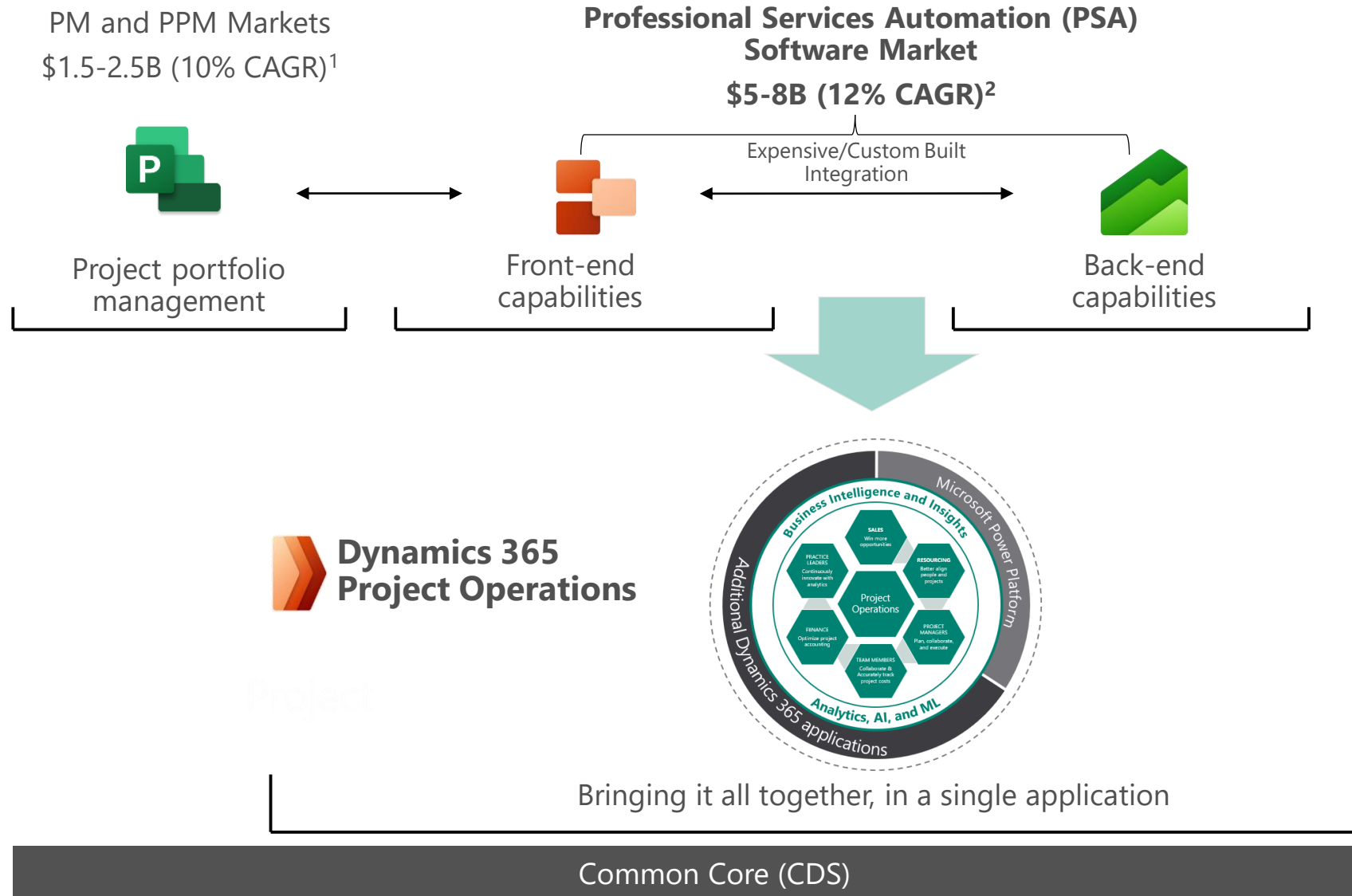**Columbus** | Once you know how...

Project Operations Introduction

Dynamics 365 product strategy

PM and PPM Markets
$1.5-2.5B (10% CAGR)[1]

Professional Services Automation (PSA) Software Market

$5-8B (12% CAGR)[2]

Expensive/Custom Built Integration

Project portfolio management

Front-end capabilities

Back-end capabilities

Dynamics 365 Project Operations

Bringing it all together, in a single application

Common Core (CDS)

The services economy is booming, and organisations need:

Flexible ways to respond to changing business models in the services world

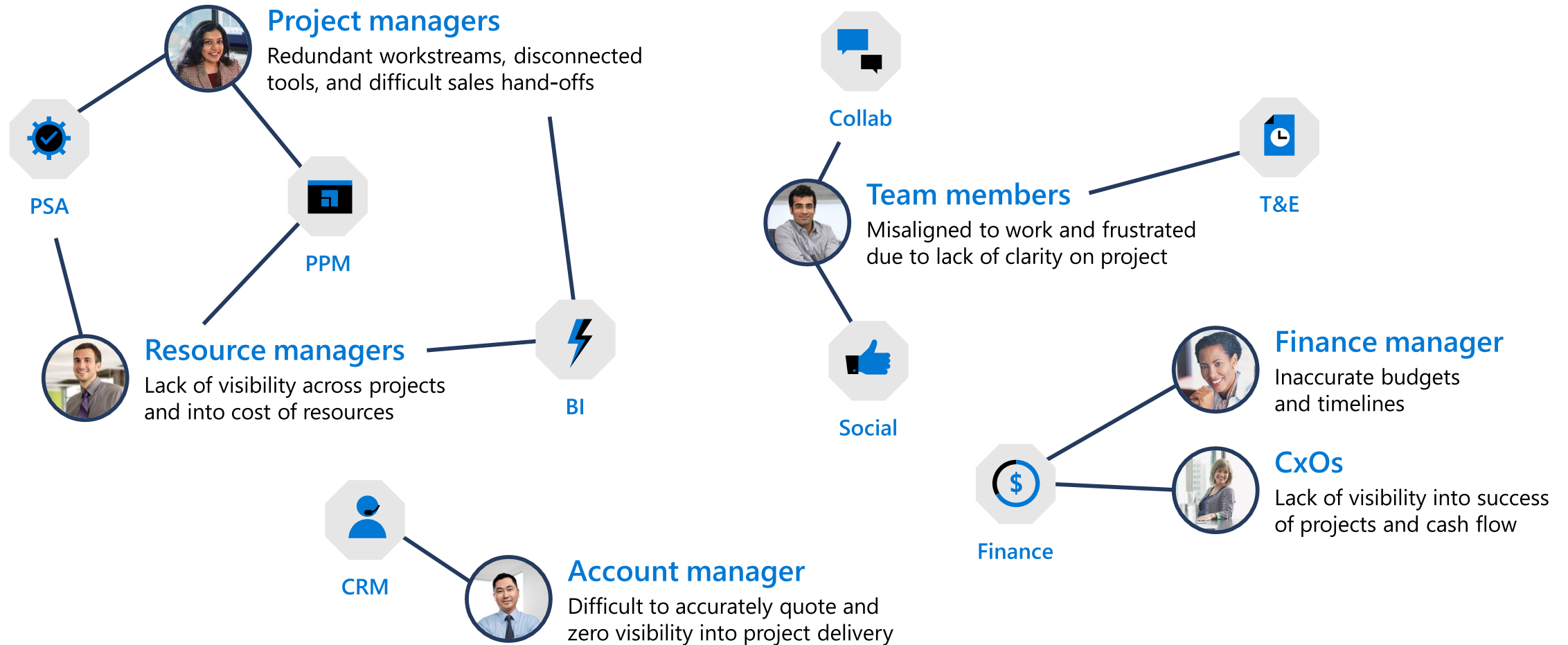Automation of business processes from lead to billing to insight

Optimization of their workforce and productivity to ensure project success

Legacy challenges

Sales
Difficult to accurately quote and zero visibility into project delivery.

Project Managers
Redundant workstreams, disconnected tools, and difficult sales hand-offs.

Finance
Inaccurate budgets and timelines

CRM

Social

Time and Expenses

Collaboration

Business Intelligence

PPM

PSA

Accounting

Team members
Misaligned to work and frustrated due to lack of clarity on project

Resourcing and HR
Lack of visibility across projects and into cost of resources

Practice leaders
Lack of visibility into success of projects and cash flow

It is challenging to achieve visibility, collaboration and reach insights with

Project managers
Redundant workstreams, disconnected tools, and difficult sales hand-offs

Collab

PSA

PPM

T&E

Team members
Misaligned to work and frustrated due to lack of clarity on project

Resource managers
Lack of visibility across projects and into cost of resources

BI

Social

Finance manager
Inaccurate budgets and timelines

CxOs
Lack of visibility into success of projects and cash flow

Finance

CRM

Account manager
Difficult to accurately quote and zero visibility into project delivery

Unify your project-centric business in a single app

Dynamics 365 Project Operations

Project Operations

Project managers
Accelerate project delivery

Resource managers
Optimize resource utilization

Account manager
Win more contracts

Partner manager
Simplify project procurement

Team members
Collaboration and simplified time and expenses

Finance manager
Deliver on-time and accurate project-based financials

CxOs
Increase business agility and operational excellence

Microsoft Dynamics 365 Project Operations – what and why ?
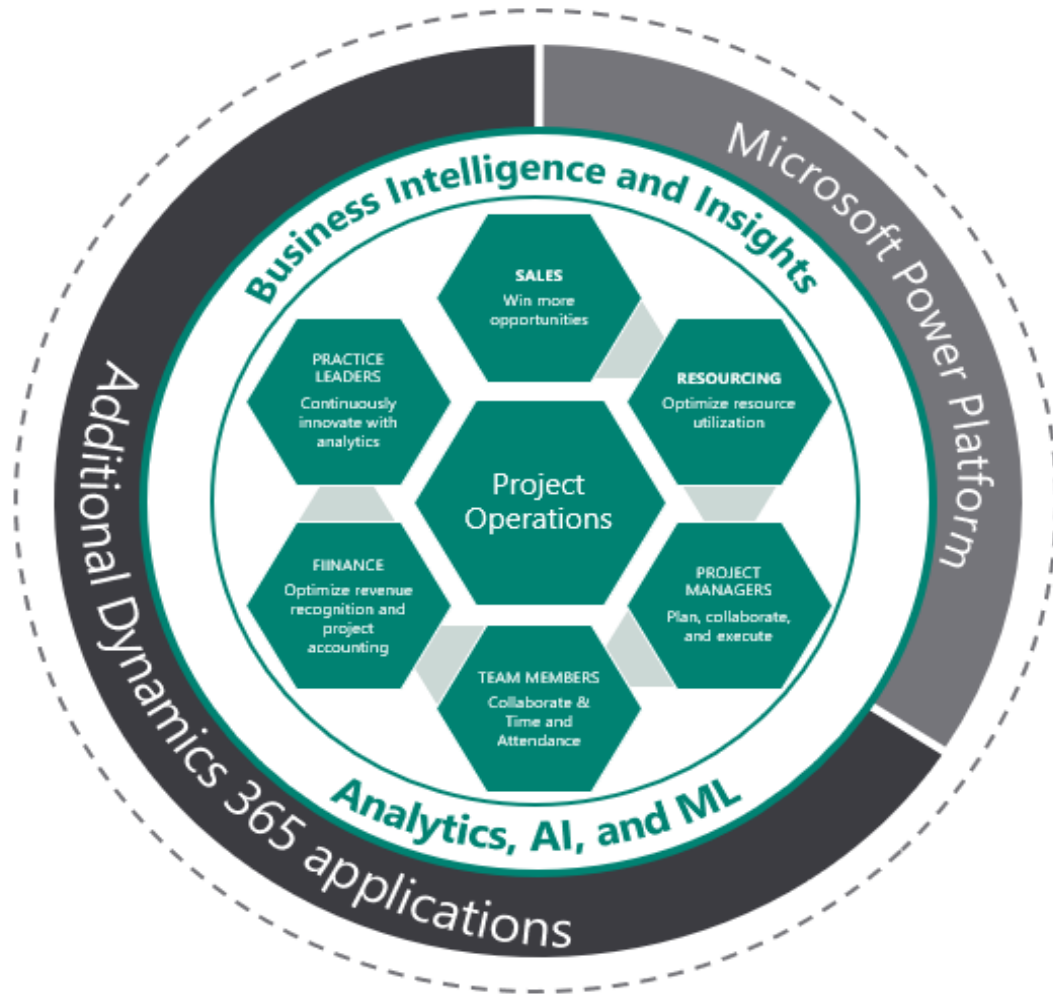
Connect your project-centric business in ONE application

Connect all teams across the business; Sales, Project Management, Resourcing, Finance

- Win more deals

- Accelerate project delivery

- Empower your employees

- Maximise your profitability

What is Dynamics 365 Project Operations?

Empower services organizations with the visibility, collaboration and insight needed to drive success across operations – from prospect to cash. **Microsoft Dynamics 365 Project Operations** connects sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate project delivery, and maximize profitability.

Project Sales	Project Planning	Resource Utilization	Team Collaboration	Time And Expenses	Project Accounting	Business Intelligence
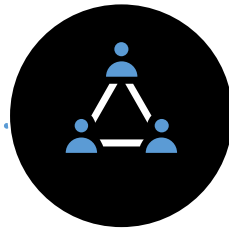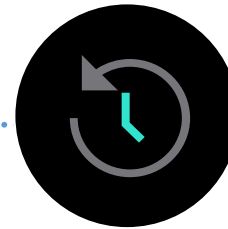
COO / Practice Director	Account Manager	Project Manager	Partner Manager	Resource Manager	Team Member	Project Accountant

PRACTICE LEADERS: Discover business insights and increase agility

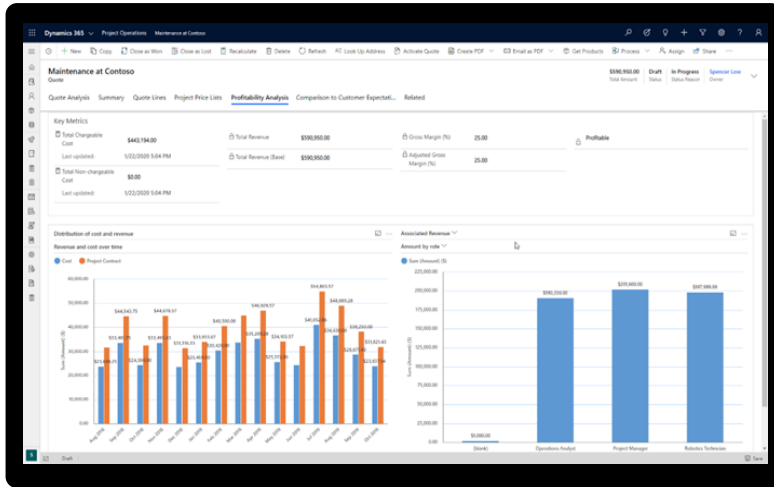**Drive innovation through better business decisions with access to data and insights.**

Gain a complete view of each project with PowerBI to understand upcoming business needs.

AI and machine learning accelerate business insights and decision-making

❖ Embedded analytics and dashboards
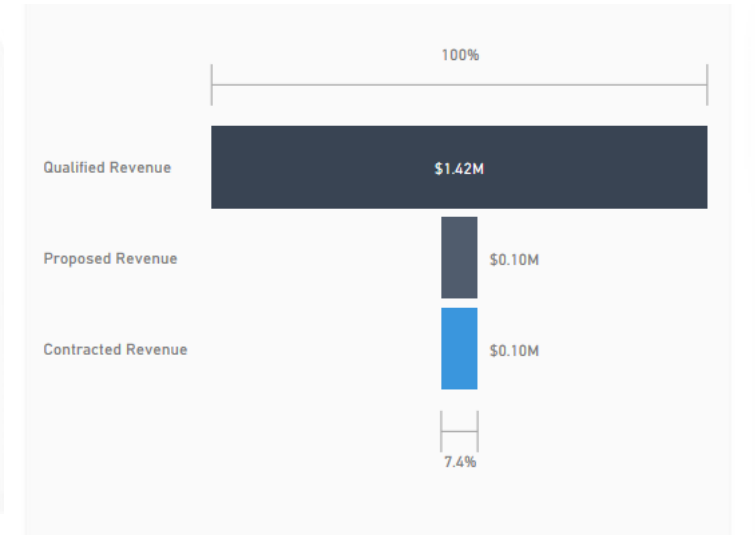
❖ PowerBI for interactive, visual business intelligence

❖ Common Data Model for unified data

SALES: Win more customers

Improve customer satisfaction with quotes and relationship management.

**Convert more sales opportunities with forecasting tools and pipeline visibility.**

Visualize sales opportunities and prioritize deals in a single management dashboard.

❖ Most PSA solutions start at sales hand-off
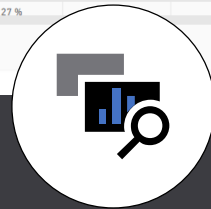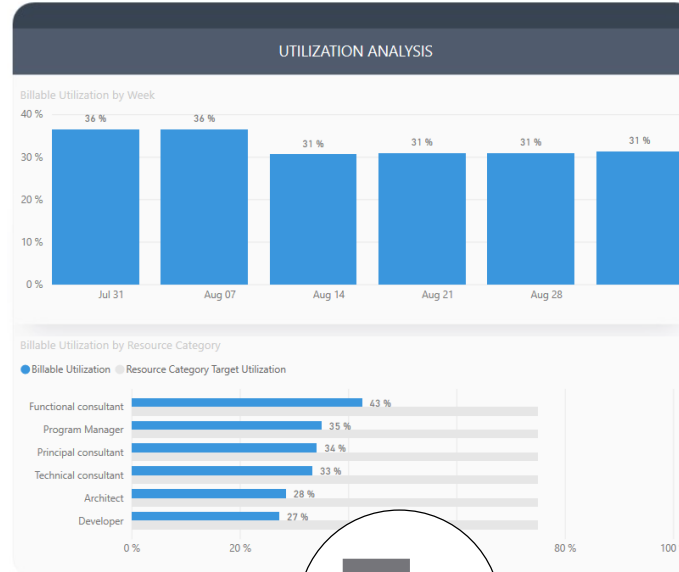
❖ Tailored project-based quotes and pricing

❖ Fixed price quotes and contract models

❖ Consumption and subscription based

❖ CPQ for human resources pricing

❖ Expense pricing options

RESOURCING: Optimize resource utilization
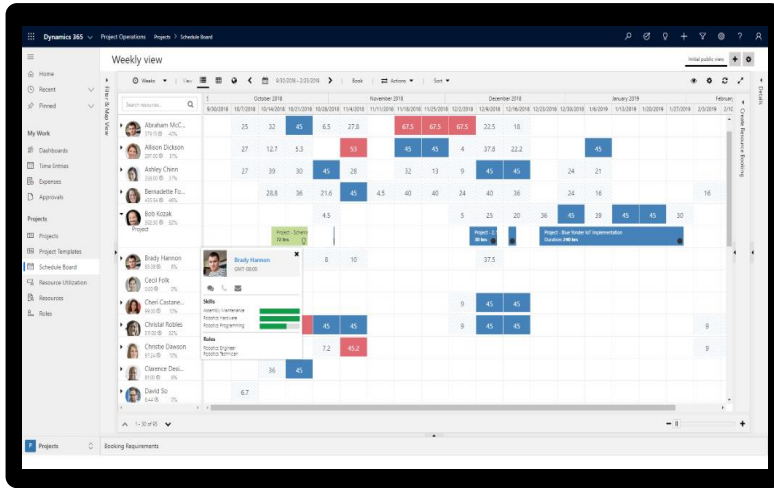
Match team member skill sets with project demands and identify gaps in resourcing.

Improve efficiency with broad visibility into availability and dynamic scheduling.
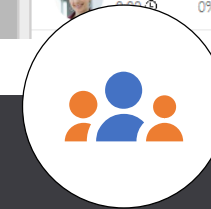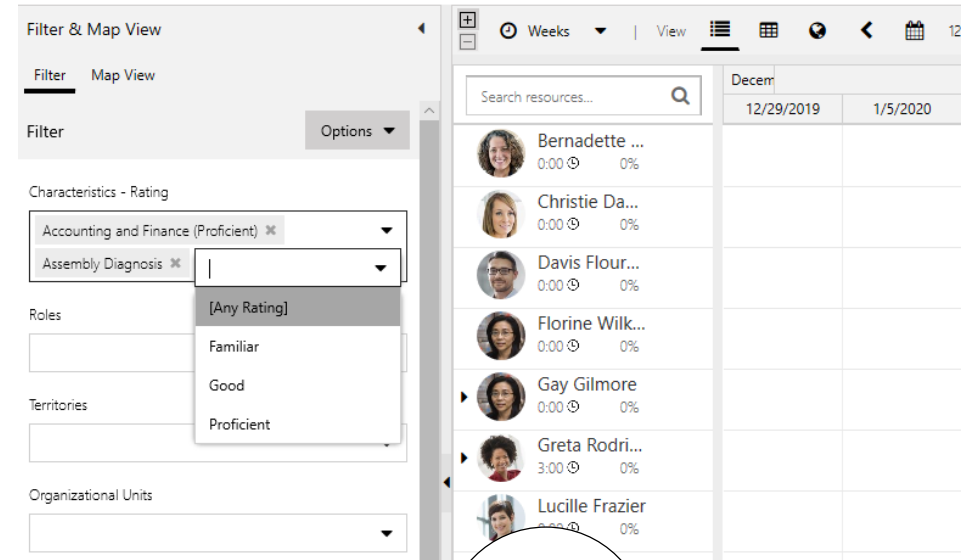
Identify and prioritize resources to address staffing needs more completely and in less time.
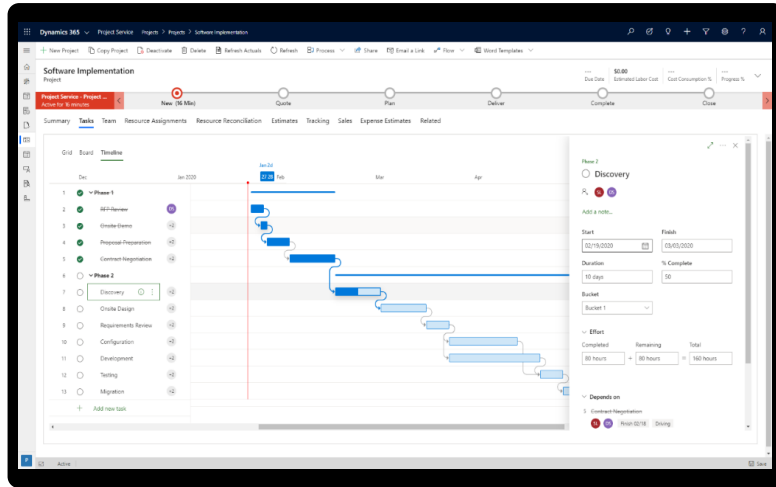
❖ Feature-rich resource management experiences available natively

❖ Highly configurable

❖ Track skills and certifications

PROJECT MANAGEMENT: Speed project delivery

Empower teams with increased transparency, streamlined communication, and higher accountability.
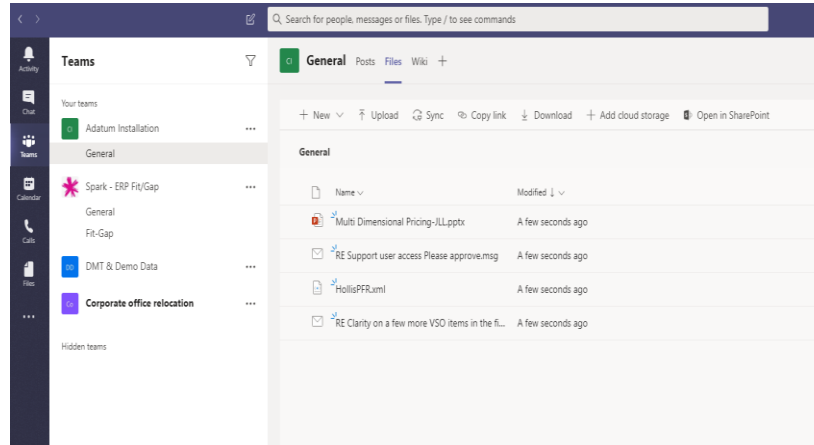
Plan, manage, and measure the performance of each project with visibility to mitigate project risk.
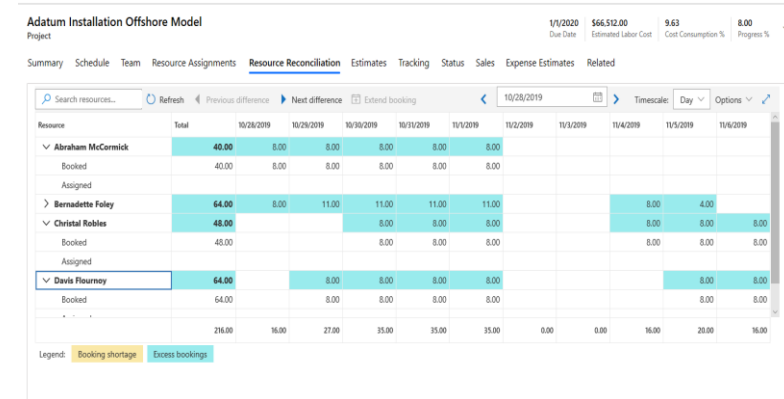
Give project managers at every skill level the tools they need to succeed with accessible dashboards and intuitive tools.

❖ No complex 2-way integrations, Microsoft Project capabilities available natively

❖ Collaborative and social with Microsoft Teams integration

❖ Familiar tool-set for better user adoption

TEAM MEMBERS: Improve productivity and simplify time and expenses
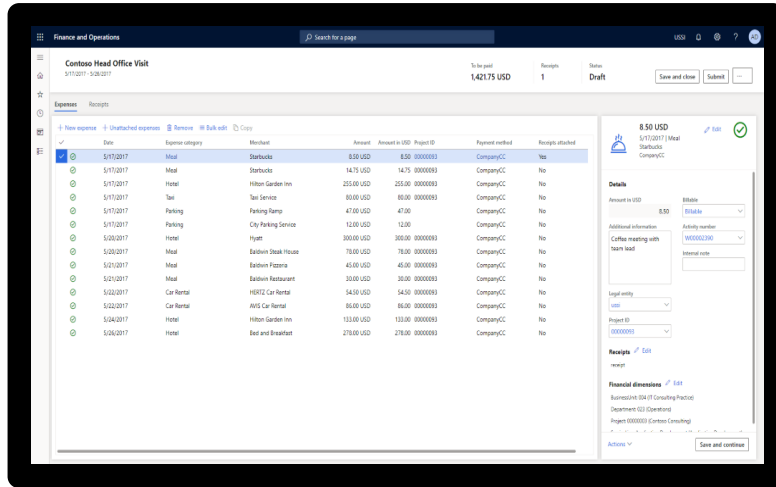
Submit, approve, process, and reconcile time and expenses, from anywhere.
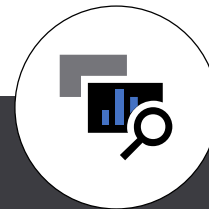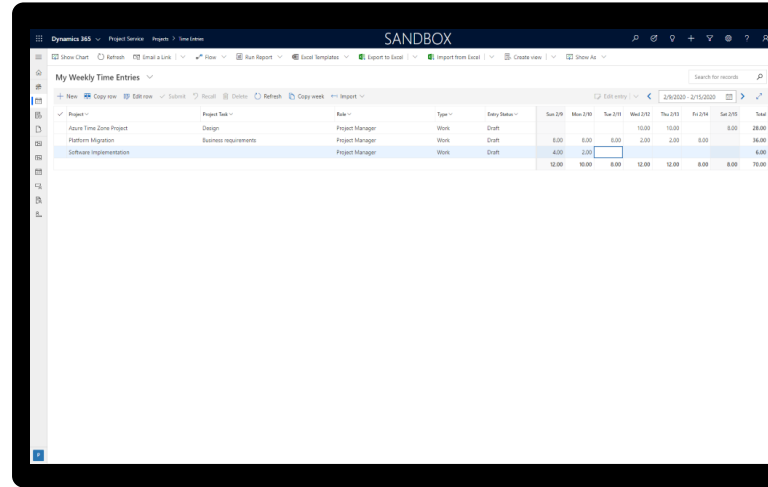
Increase project compliance with easy-to-use time and expense tracking tools.

Quickly connect to the apps and services your team is already using.

❖ Extensible and easy to use experiences

❖ Mobile

❖ Collaborative

FINANCE: Maximize Project Profitability
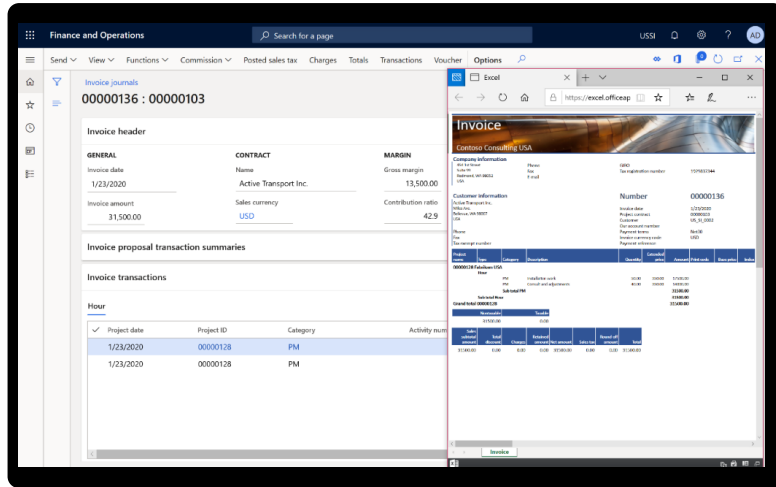
Plan, manage, cost, and measure the performance of each project.
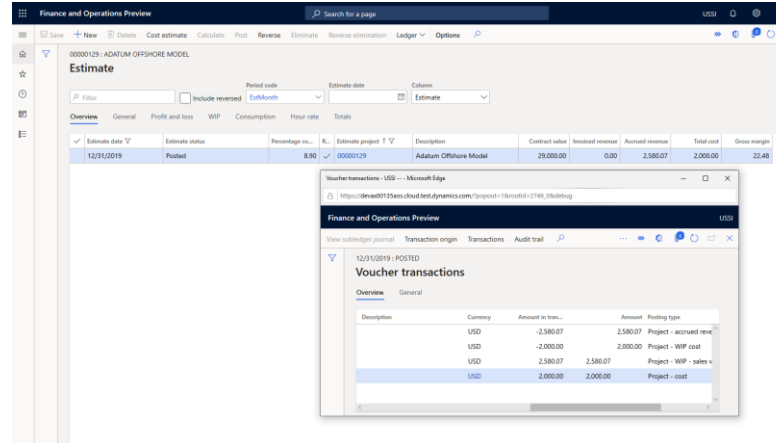
Foster best practices and ensure compliance to published standards and practices.

Quickly and accurately track project spend and payables with invoicing and purchase order management.

❖ Detailed project costing

❖ IFRS compliant revenue recognition

❖ Seamless integration to collections

Microsoft Dynamics 365 for Project Operations

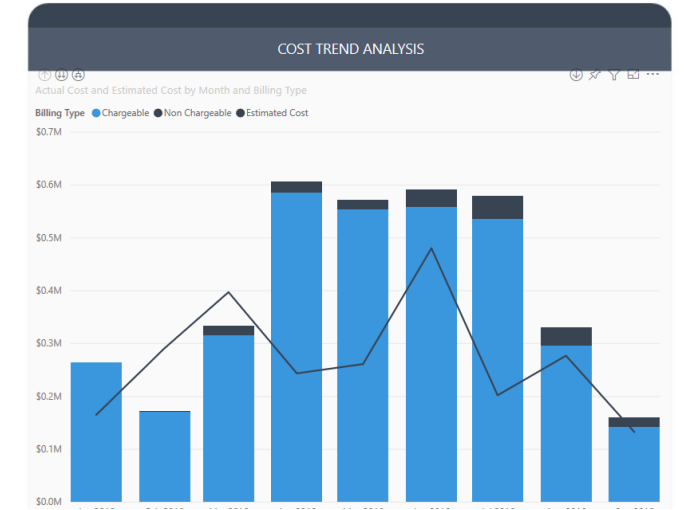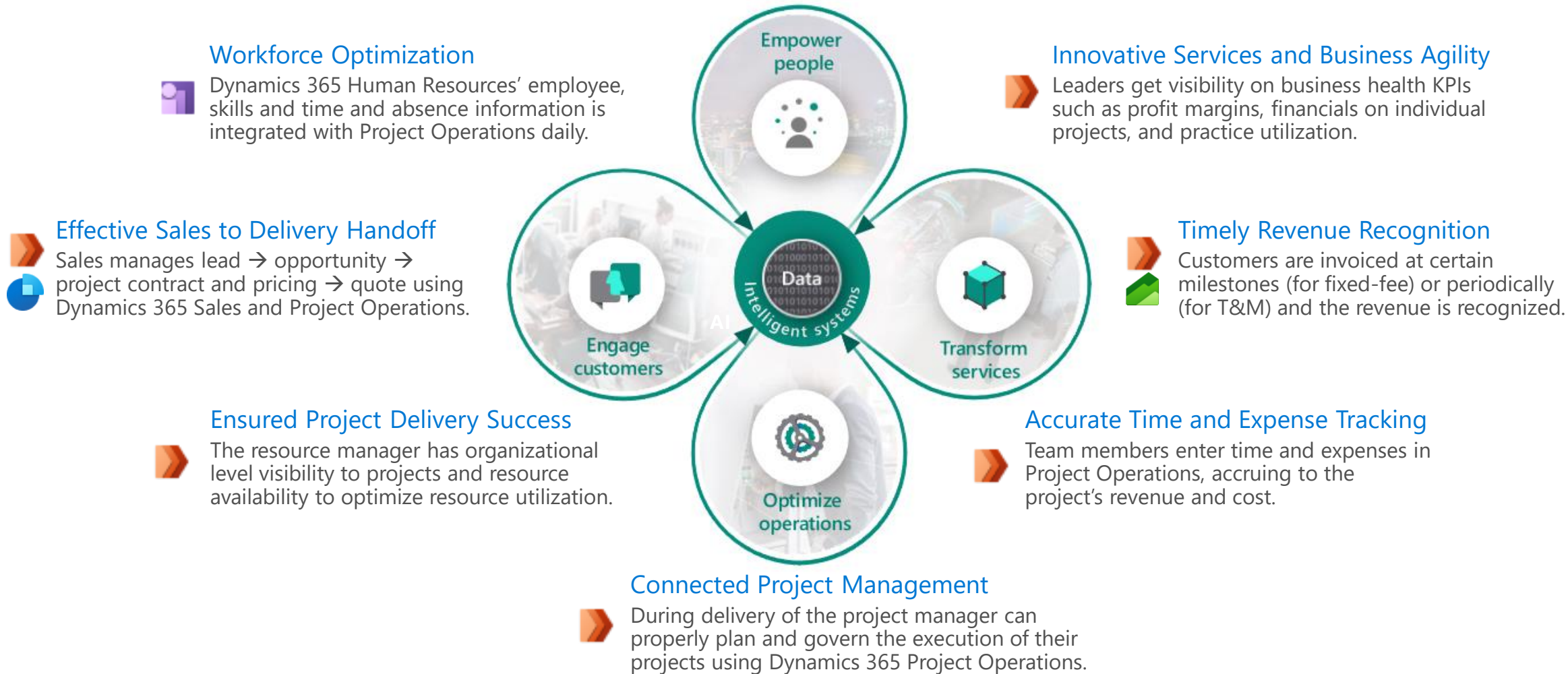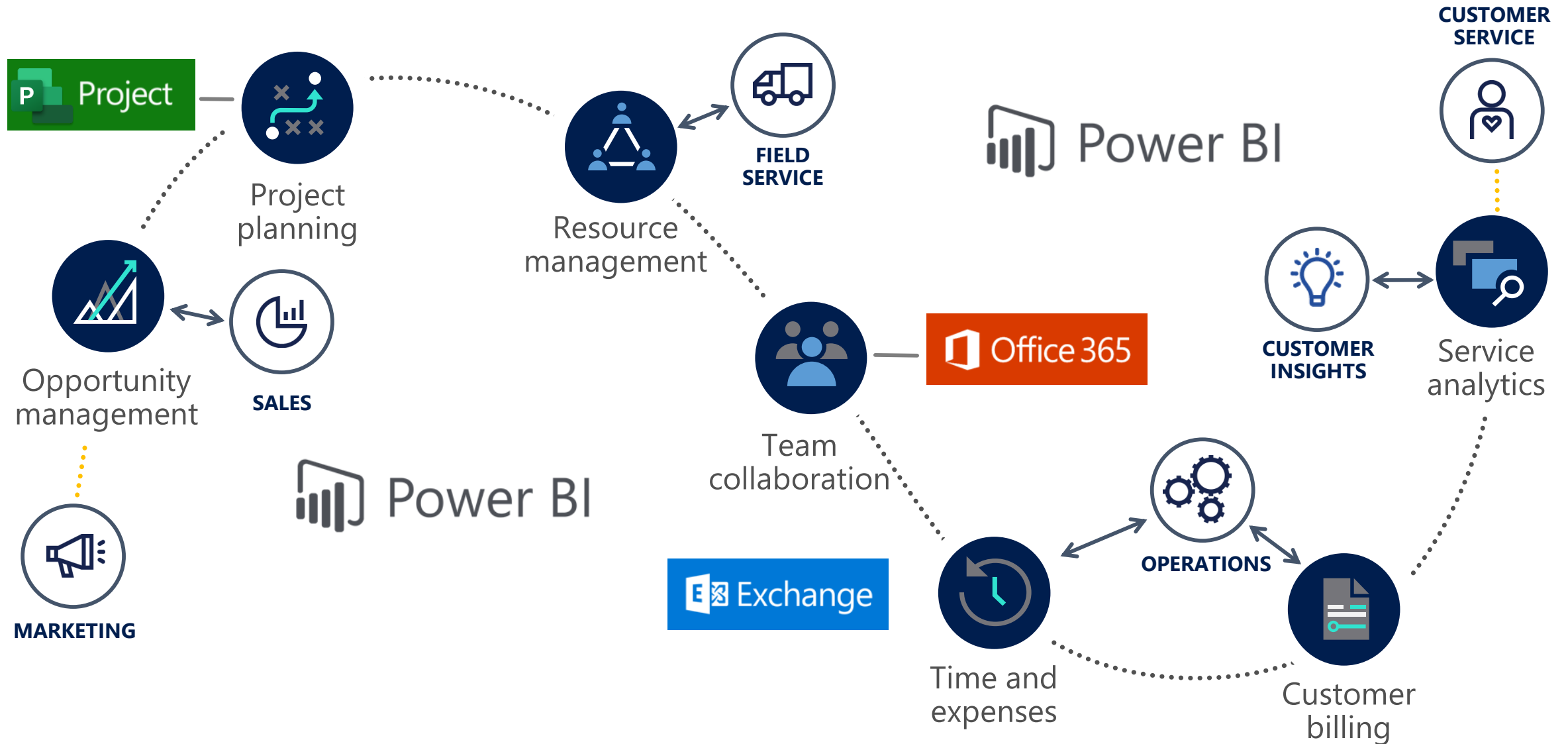|						
Project Sales	Multiple contract types	Lead to Quote processes	Quote revisions	Quote to Project processes		
Project planning	WBS	Interactive Gantt and Kanban boards	Co-authoring	Dependencies and constraints	Teams integration	Materials forecasts with Inventory integration	Procurement integration
Resource Management	Skills Management	Requirements and Bookings infrastructure	Configurable filters, and search	Reconciliations for bookings and assignments	Resource request and proposals	
Time, expense entry and approval	Intuitive web and mobile experiences for entry	Options for approvers to edit	Deep Expense management			
Project costing, pricing and Actuals	Configurable dimensions for cost, sales and purchase pricing	Catalog pricing for products and services	Corrections of actuals and integration to Financial system			
Invoicing	Periodic Invoices	Word-based invoice templates	Configurable summarization	Invoice Corrections	Taxes and Exchange rates	
Project Financials	Revenue Recognition	Committed costs	Retainage and Pay-When-Paid			

# Project Operations and the Digital Feedback Loop

In the digital transformation era, as solutions evolve from a forms over data siloed applications to a world of data and insights driven business applications, the lines between CRM and ERP are blurring. Dynamics 365 Project Operations is a stand-alone business application that transcends these traditional boundaries and will cater to personas from the account manager to the project accountant.

Workforce Optimization
Dynamics 365 Human Resources' employee, skills and time and absence information is integrated with Project Operations daily.

Effective Sales to Delivery Handoff
Sales manages lead → opportunity → project contract and pricing → quote using Dynamics 365 Sales and Project Operations.

Ensured Project Delivery Success
The resource manager has organizational level visibility to projects and resource availability to optimize resource utilization.

Innovative Services and Business Agility
Leaders get visibility on business health KPIs such as profit margins, financials on individual projects, and practice utilization.

Timely Revenue Recognition
Customers are invoiced at certain milestones (for fixed-fee) or periodically (for T&M) and the revenue is recognized.

Accurate Time and Expense Tracking
Team members enter time and expenses in Project Operations, accruing to the project's revenue and cost.

Connected Project Management
During delivery of the project manager can properly plan and govern the execution of their projects using Dynamics 365 Project Operations.

Empower people

Engage customers

Data
Intelligent systems

AI

Transform services

Optimize operations

Microsoft's end-to-end project capabilities

Gain a competitive edge with Dynamics 365 Project Operations
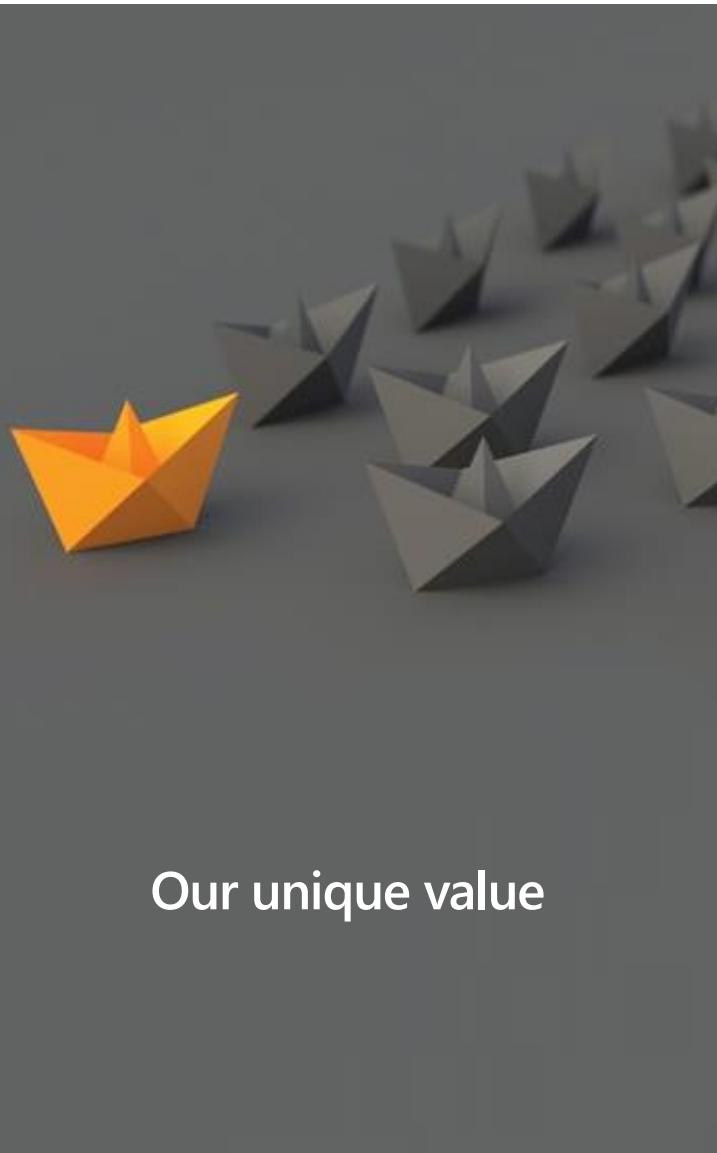
Our unique value

Broad and deep solution—leveraging platform investments, as well as front and back office capabilities to connect your teams across the project operations lifecycle.

Microsoft Project for the web is embedded within Project Operations to improve collaboration, better serve customers, and accelerate project delivery.

Real-time business insights across your project and service operations allow you to adapt to demand, focus on the right projects, and drive business model changes.

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