

OFFER

KINETIQ Foresight: 6–10 Week Integrated Planning and FP&A Implementation





Program Description

KINETIQ Foresight

This implementation offers KINETIQ Foresight as a unified planning solution running natively on Microsoft Fabric and Dynamics 365 Finance & Operations (D365 F&O). It brings together operational planning and financial planning in a single governed environment, so finance, supply chain, and operations leaders can make decisions using the same trusted data.

The engagement includes discovery, solution design, implementation, and enablement to help organizations move beyond spreadsheet-driven planning and establish a scalable, Microsoft-based planning foundation that improves agility, visibility, and forecast confidence.



Executive Value Proposition

- ✓ **Unify planning on the Microsoft platform**
Use Microsoft Fabric and D365 F&O as the planning foundation to reduce fragmentation, improve governance, and align finance and operations on one source of truth.
- ✓ **Connect operational decisions to financial outcomes**
Link demand, supply, inventory, and capacity plans directly to revenue, margin, cash flow, and balance sheet forecasts to improve decision quality.
- ✓ **Accelerate forecasting and scenario planning**
Replace manual planning cycles with more responsive forecasting and scenario analysis using governed data already available across your Microsoft estate.
- ✓ **Increase return on Microsoft investments**
Extend the value of Fabric and D365 F&O by adding integrated planning capabilities, rather than adding another disconnected planning platform.



Key Business Challenges Adressed

Finance

Supply Chain

Operations

Disconnected

Disconnected planning across functions

Finance, supply chain, and operations often rely on separate tools and spreadsheets, limiting visibility into how operational changes affect revenue, margin, and cash.

Data Collection and Manual Input

Review and Reconciliation

Delayed

Delayed

Slow and manual forecasting cycles

Budgeting and forecasting processes require significant manual effort and are often too slow to support timely decisions in dynamic market conditions.

Microsoft Environment

Outside Microsoft

Microsoft Fabric

40%

Dynamics 365 Finance & Operations

27%

Duplicate Data

Disconnected Insights

Limited Governance

Underused Microsoft data estate

Organizations may have Fabric and D365 F&O in place, but planning remains outside the Microsoft environment, leading to duplication and reduced governance.

Variable Inputs

Impact outputs

Demand Shift

Supply Disruption

Cost Change

Complex to Model

Revenue Impact

Margin Impact

Cash Impact

Limited scenario modeling capability

Teams need faster ways to model demand shifts, supply disruptions, and cost changes and understand the combined operational and financial impact.



Deployment Options

A

oDelivered as a Dynamics 365 Finance & Operations implementation through Microsoft Business Performance Planning

OR

B

Delivered as a fully Microsoft Fabric-native deployment for organizations standardizing planning directly on the Microsoft data platform



Executive Scope of the Engagement

This offer is typically delivered over 6 to 10 weeks and provides a structured path from assessment through deployment, enablement, and initial operational adoption.

Phase 1



Discovery & Assessment

- ✓ Facilitated workshops with finance, supply chain, operations, and IT stakeholders to confirm strategic objectives, planning pain points, and priority KPIs.
- ✓ Review of current S&OP, FP&A, and budgeting processes, supporting tools, and planning calendar.
- ✓ Assessment of the existing Microsoft data landscape across Fabric, D365 F&O, and relevant adjacent systems.
- ✓ Definition of initial use cases, implementation priorities, and measurable success criteria for the first phase.

Phase 2



Solution & Data Model Design

- ✓ Design of a unified planning data model on Fabric that brings together operational and financial data from D365 F&O and other approved sources.
- ✓ Definition of planning hierarchies, time buckets, and scenario structures to support budget, forecast, actual, and what-if analysis.
- ✓ Design of the integrated S&OP and finance process, including cadence, decision roles, approvals, and governance alignment.

Phase 3



KINETIQ Foresight Implementation

- ✓ Deployment and configuration of KINETIQ Foresight within the customer's Microsoft Fabric environment, aligned to enterprise security and compliance requirements.
- ✓ Connection to D365 F&O and prioritized operational data sources, including orders, production, inventory, bills of material, and cost data.
- ✓ Configuration of one to two priority planning flows, such as:
 - Demand planning and consensus forecasting to support the S&OP process.
 - Supply and inventory planning with capacity constraints.
 - Financial forecasting for revenue, cost of goods sold, gross margin, and selected operating expenses derived from the operational plan.
- ✓ Delivery of core Power BI dashboards and reports, including plan versus actual, scenario comparisons, and executive S&OP views.

Phase 4



Validation, Training & Handover

- ✓ User acceptance testing with business stakeholders, along with refinement of models, assumptions, and reporting outputs.
- ✓ End-user training for finance, supply chain, and operations teams on the new planning process and solution experience.
- ✓ Administrator enablement for IT and data teams to manage pipelines, security, and ongoing model enhancement.
- ✓ Documentation of the solution architecture, planning model, operating procedures, and recommended roadmap for future expansion.

Expected Outcomes and Deliverables



Business Outcomes

- ✓ **Aligned operational and financial planning** across a single Microsoft-based planning environment.
- ✓ **Faster planning and forecasting cycles** that improve organizational responsiveness.
- ✓ **Greater forecast confidence** through governed data, standardized assumptions, and cross-functional alignment.
- ✓ **Improved executive visibility into trade-offs** with clearer insight into the financial impact of operational decisions.
- ✓ **More value from Fabric and D365 F&O** by extending existing Microsoft investments with integrated planning capabilities.



Tangible Deliverables

- ✓ Assessment report summarizing the current state, priority planning challenges, and recommended use cases.
- ✓ Solution architecture and planning data model documentation for KINETIQ Foresight on Fabric and D365 F&O.
- ✓ Configured KINETIQ Foresight environment in the customer tenant with:
 - Connected data feeds from D365 F&O and approved operational systems.
 - Implemented planning models for the agreed S&OP and FP&A use cases.
 - Core workflows, templates, and role-based security configuration.
- ✓ Power BI dashboards and reports for planning stakeholders, including KPI views, plan versus actual reporting, and scenario comparison analysis.
- ✓ Training materials, knowledge transfer sessions, and an operational runbook for ongoing adoption and enhancement.



Engagement Timeline

Delivery timelines can be adjusted based on scope, complexity, and data readiness. The example below reflects a standard implementation for a mid-market or lower enterprise customer.

Weeks 1-2

Discovery & Assessment

- ✓ Workshops, process review, and data landscape analysis.
- ✓ Use case definition and scope confirmation.

Weeks 3-4

Design

- ✓ Data model and architecture design on Fabric.
- ✓ Planning process design and initial backlog.

Weeks 5-8

Implementation & Configuration

- ✓ Deploy KINETIQ Foresight and connect to D365 F&O.
- ✓ Configure priority S&OP and financial planning models; build dashboards.

Weeks 9-10

Testing, Training & Go Live

- ✓ UAT, refinements, and cut over to new planning processes.
- ✓ Business and admin training; go live for initial scope.

For larger or more complex organizations, this engagement can serve as a Phase 1 implementation, followed by an expansion and optimization roadmap.



Ideal Customer Profile

✓ Industry Profile

- Manufacturing, distribution, and other asset-intensive industries where supply, capacity, and demand decisions materially affect financial performance.

✓ Technology foundation

- Organizations with existing or planned investments in Microsoft Fabric and Dynamics 365 Finance & Operations.
- Enterprises seeking to standardize planning, analytics, and decision support on the Microsoft Fabric platform.

✓ Organizational Priorities

- CFOs, COOs, heads of supply chain, and finance transformation leaders focused on improving forecast quality, planning agility, and cross-functional alignment.
- Organizations operating across multiple sites, regions, or business units with growing complexity in planning and performance management.



Recommended Next Step

Request a complimentary 60-minute Integrated Planning Strategy Session

During this session, our specialists will review your current S&OP and FP&A processes, assess your Microsoft Fabric and D365 F&O environment, and identify the highest-value opportunities to unify operational and financial planning. You will receive an executive-level readiness summary and recommended next steps for implementation.