

IBM
**Strategy
Consulting**

**IBM Microsoft
Platform CoE**



Digital Transformation accelerated

Organizations are accelerating their digital transformation efforts for converting data into meaningful value, finding new ways to serve customers and building solutions that are relevant for a rapidly changing socio-economic environment.

>83%

of the organizations believe they need to embrace tech intensity to be successful in the future.

100 MUSD

Leaders in digital transformation generate an average of \$100 million more in additional operating income each year

“We stand on the brink of a technological revolution that will fundamentally alter the way we live, work, and relate to one another.

In its scale, scope, and complexity, the transformation will be unlike anything humankind has experienced before.”

Klaus Schwab

Founder and Executive Chairman of the World Economic Forum

Source
Keystone strategic interviews
IDC Future Landscape

Pillars of Digital Transformation

For most organizations, the 1st focus for digital transformation is customers. However, to generate new sources of revenue, organizations need to empower employees , drive optimized operations and processes and transform business models.



Source
Keystone strategic interviews
IDC Future Landscape

IBM + MICROSOFT drive digital transformation



Empower Employees



Transform the Customer Experience



Build a resilient business



Innovate on your business model

Improve employee business productivity

Optimize automation processes

On-demand scale and faster time to market

Extend business processes to innovate with Azure Services

Employee Experience

Intelligent Automation

Agility & DevOps

Acquire and retain customers with improved personalized experiences

Cloud Transformation



Sales Efficiency



Breakdown business silos

Business Integration

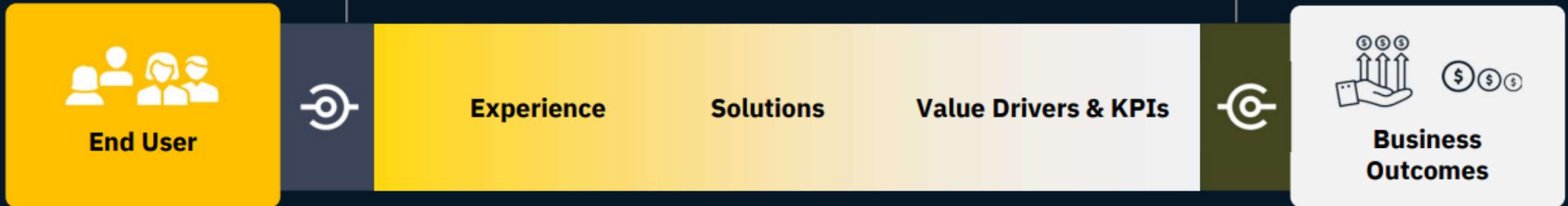


Data & Analytics

Gain actionable Insight to unlock value of the data

Organizing value-based digital transformations

Value Orchestration links outcomes with experiences



A transformation focused on user experience alone will struggle to create value

A focus on financial impact alone ignores the user experiences that matter most

1

Features are defined based on end-user needs, and are identified through **pain point** tracking, user interviews and design thinking workshops

2

The intended change of behaviors and end user experience are determined through workshops and user interviews

3

The end user experience implies a set of discreet steps, with solutions to address pain points within those discreet steps, value drivers that describe the value from those solutions, and operational KPIs that directly impact those value drivers

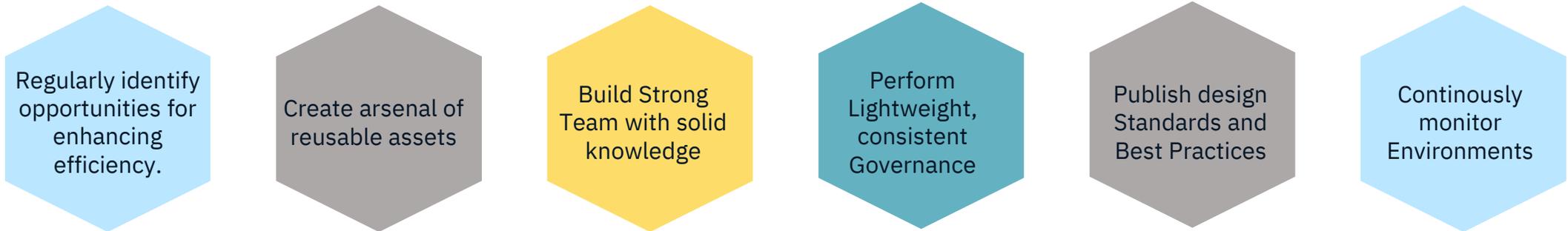
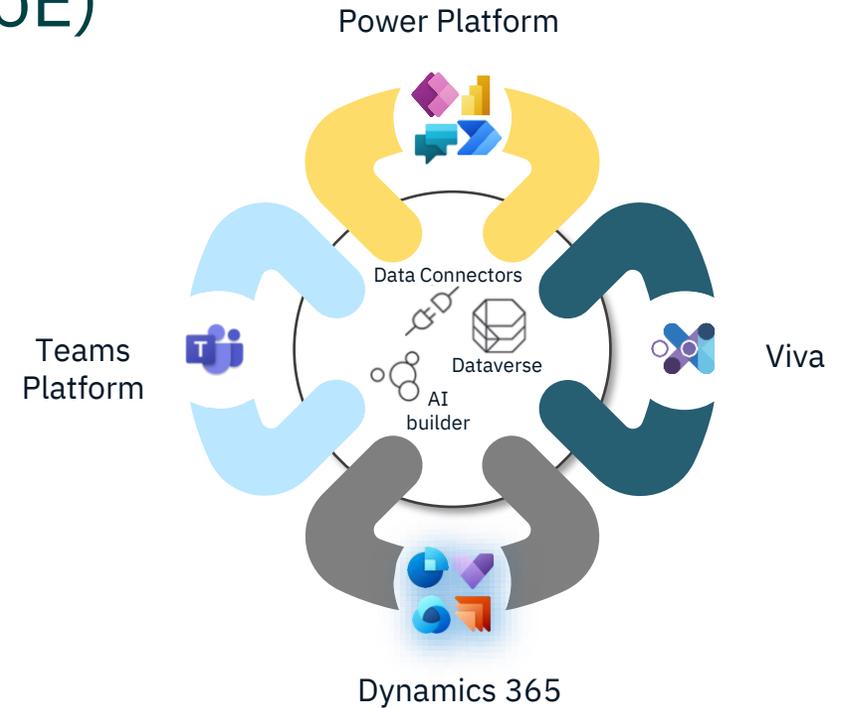
4

The model outputs an estimate of business value at the feature-level, allowing for prioritization based on both alignment to strategic objectives and value

Microsoft Platform Centre of Excellence (CoE)

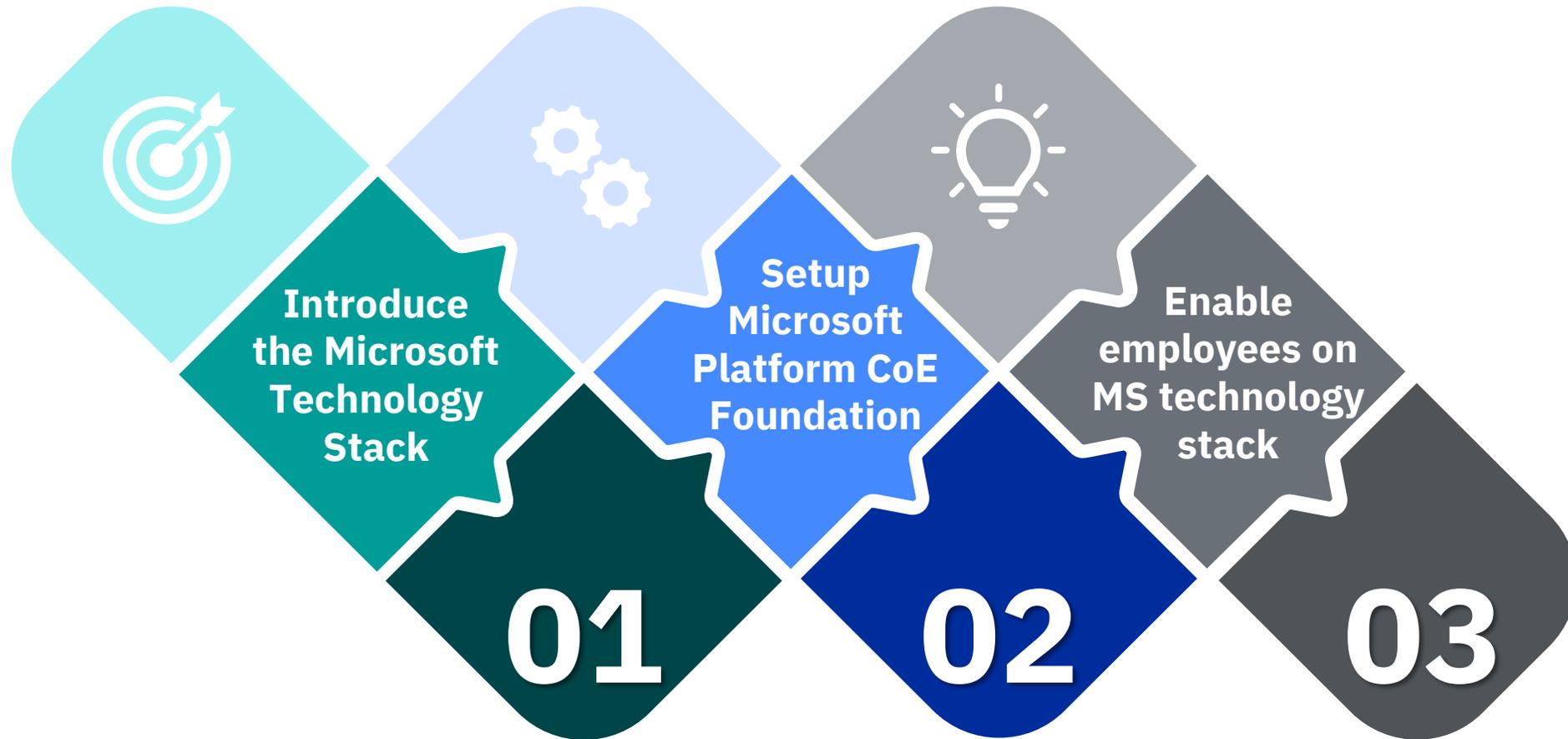
Microsoft Platform CoE can be a powerful way for an organization to align around business goals rather than individual department metrics, foster creativity and innovation, support better communication through shared information.

- Accelerate the adoption of the Microsoft platform
- Nurture organic growth, while maintaining governance.
- Control and keep the data secure in order to avoid data loss and app duplication.



Guiding Principles

The Building blocks of a Microsoft Platform COE



Introduce the Microsoft Technology Stack

Power Platform - Microsoft's Enterprise Low-Code Application Platform

The Microsoft Power Platform is a powerful set of applications that allow you to **automate processes, build solutions, analyze data, and create virtual agents.**

No Code

Drag and drop experiences that are like PowerPoint

Low Code

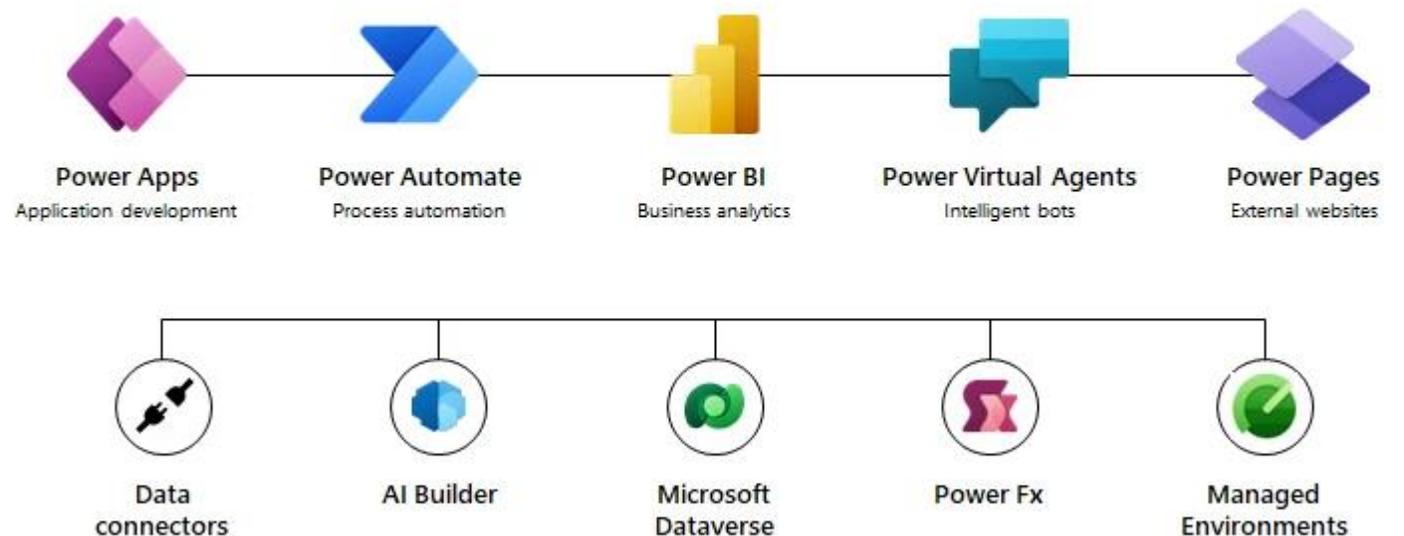
Drag and drop plus Excel-like formulas for functionality

Code First

Professional development and extensibility across Microsoft

Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications



Microsoft Teams – Microsoft’s Unified Communications as a Service

Stay connected and access shared content any time to learn, plan, and innovate—together.

Meet



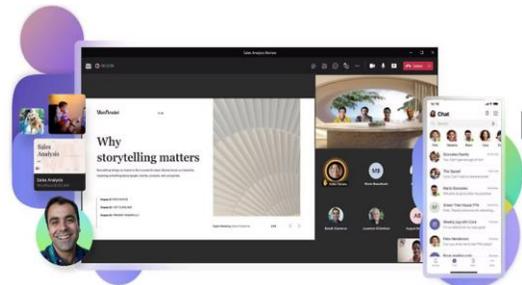
Share Screen, Change or blur background and use together mode

Call



Easily find, share, and edit files together in real time with apps like Word, PowerPoint, and Excel, SharePoint

Collaborate



Make receive calls in Teams with advanced features like group calling, voicemail, and call transfers

Chat



Share your thoughts and your personality. Send GIFs, stickers, and emojis in one-to-one or group chats.

SharePoint- Content collaboration for the modern workplace

Content services

shared files, pages, data, and apps across Office 365

Anywhere access to files

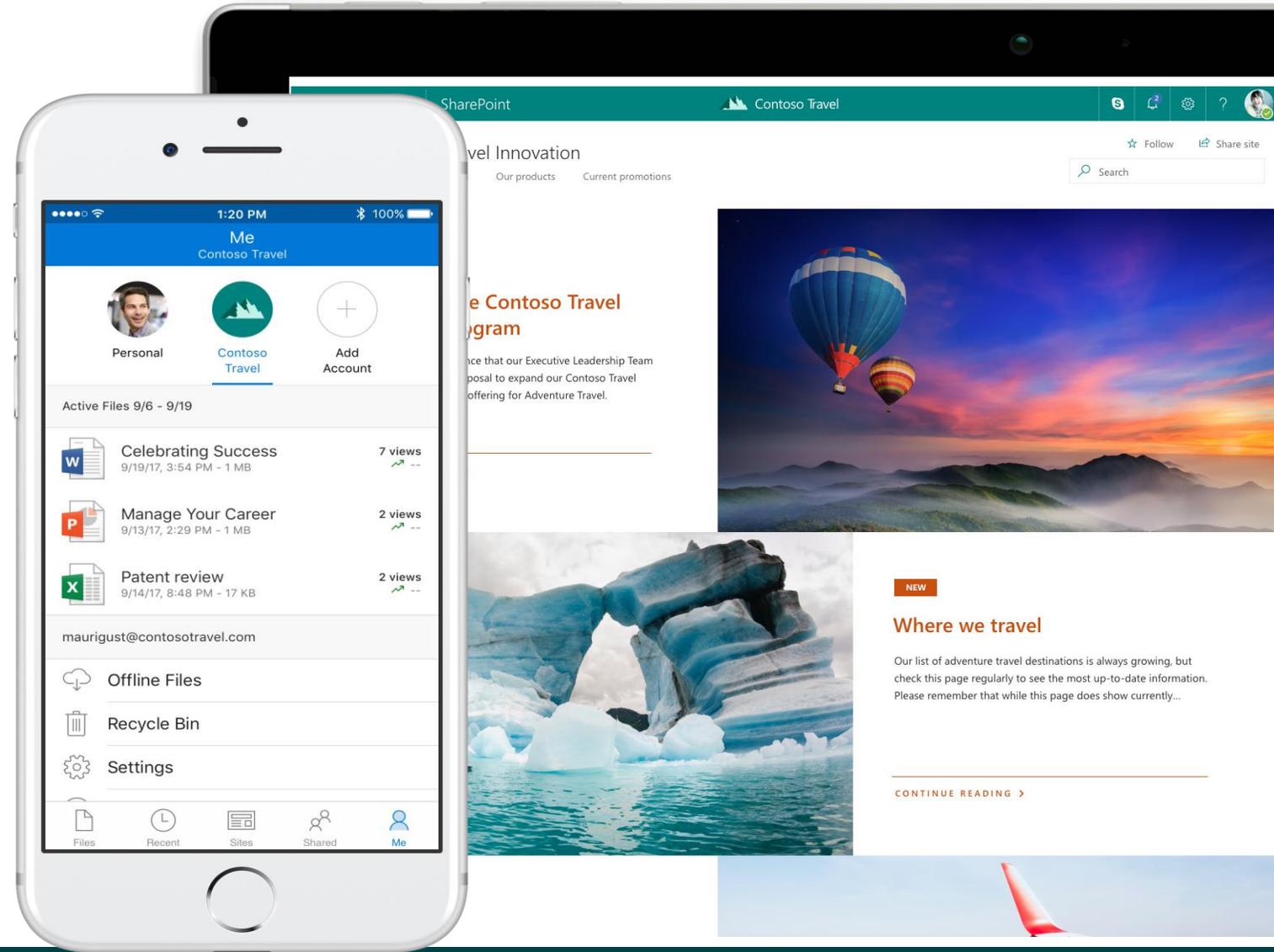
simple and secure sharing with OneDrive

Intelligent intranet & search

connect people, news, knowledge, and apps

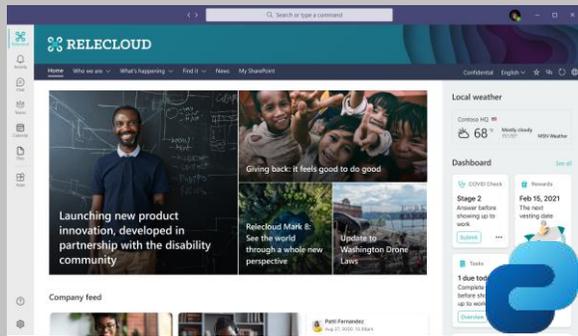
Modern solutions framework

no-code apps, workflow, and custom development



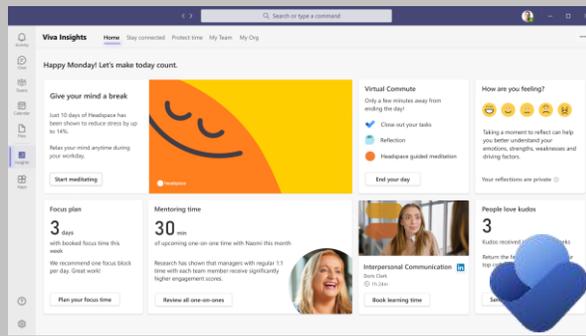
Microsoft Viva – Microsoft’s Employee Experience Platform

A system of experiences that help organizations create a thriving culture with engaged employees and inspiring leaders



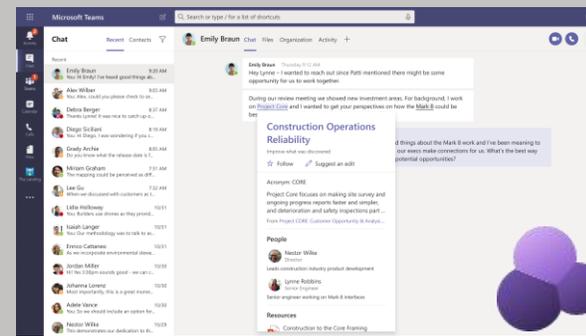
Connections

Culture and communications



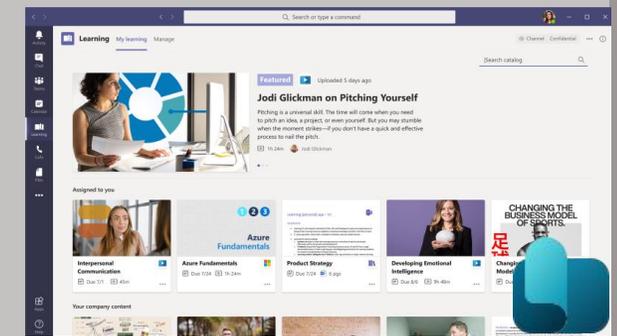
Insights

Productivity and wellbeing



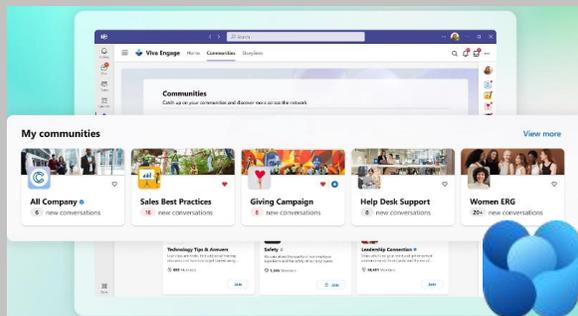
Topics

Knowledge and expertise



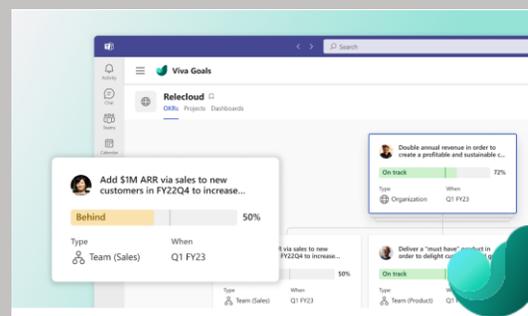
Learning

Skilling and growth



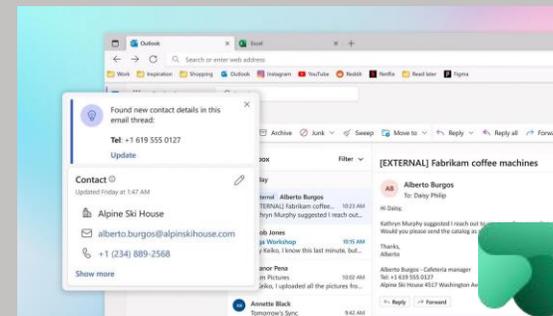
Engage

Connect and Express



Goals

Goals and OKR



Sales

seller experience with any CRM

Microsoft Business Applications Platform

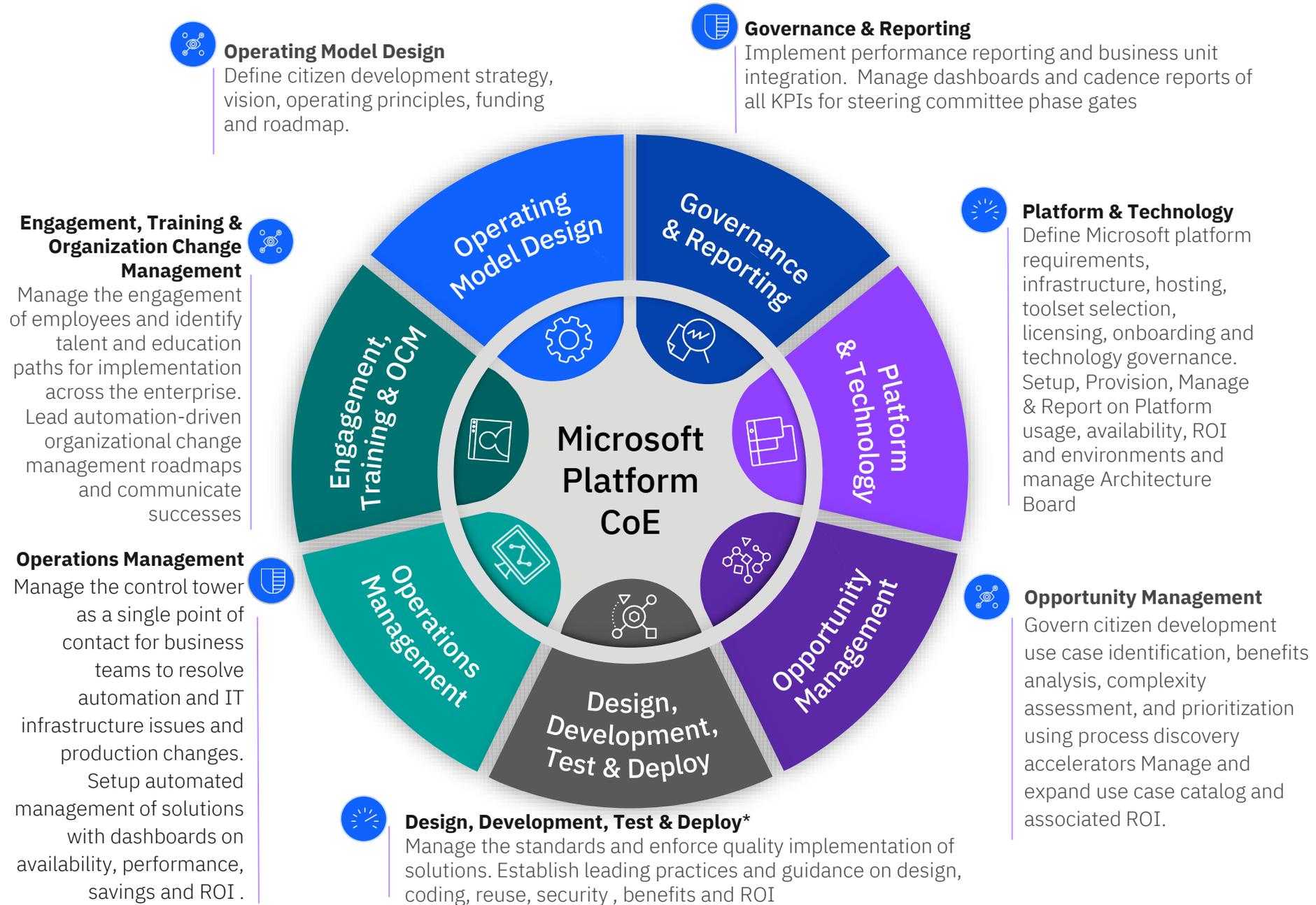
POWERFUL, FLEXIBLE AND AGILE

From optimizing operations, empowering your employees, or transforming your products and services, Microsoft 365, Dynamics 365 and Power Platform give you the power, flexibility, and agility to help your business thrive.

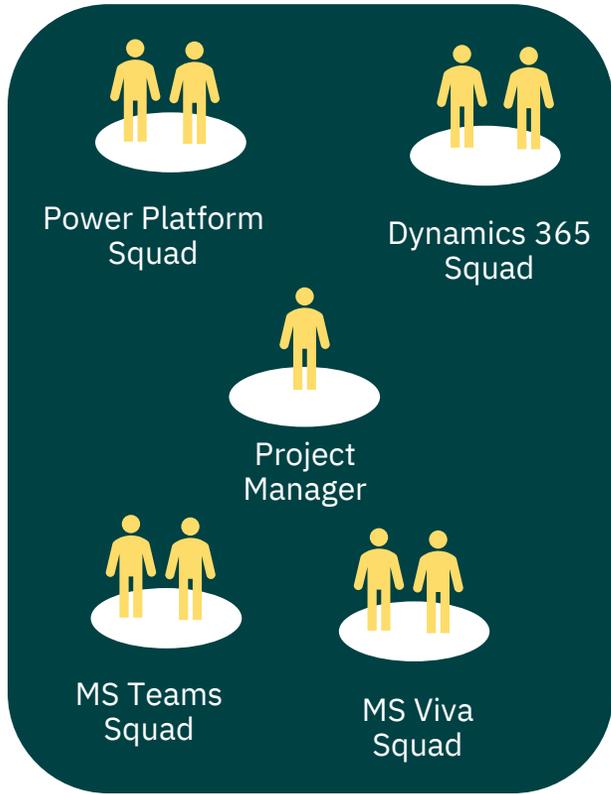


Setup Microsoft Platform CoE Foundation

Define responsibilities of Microsoft Platform CoE



Organize Microsoft Platform CoE Organization



IBM Team



IBM's Capacity to support worldwide

6000+

Microsoft Experts Globally

100%

Geographical Coverage

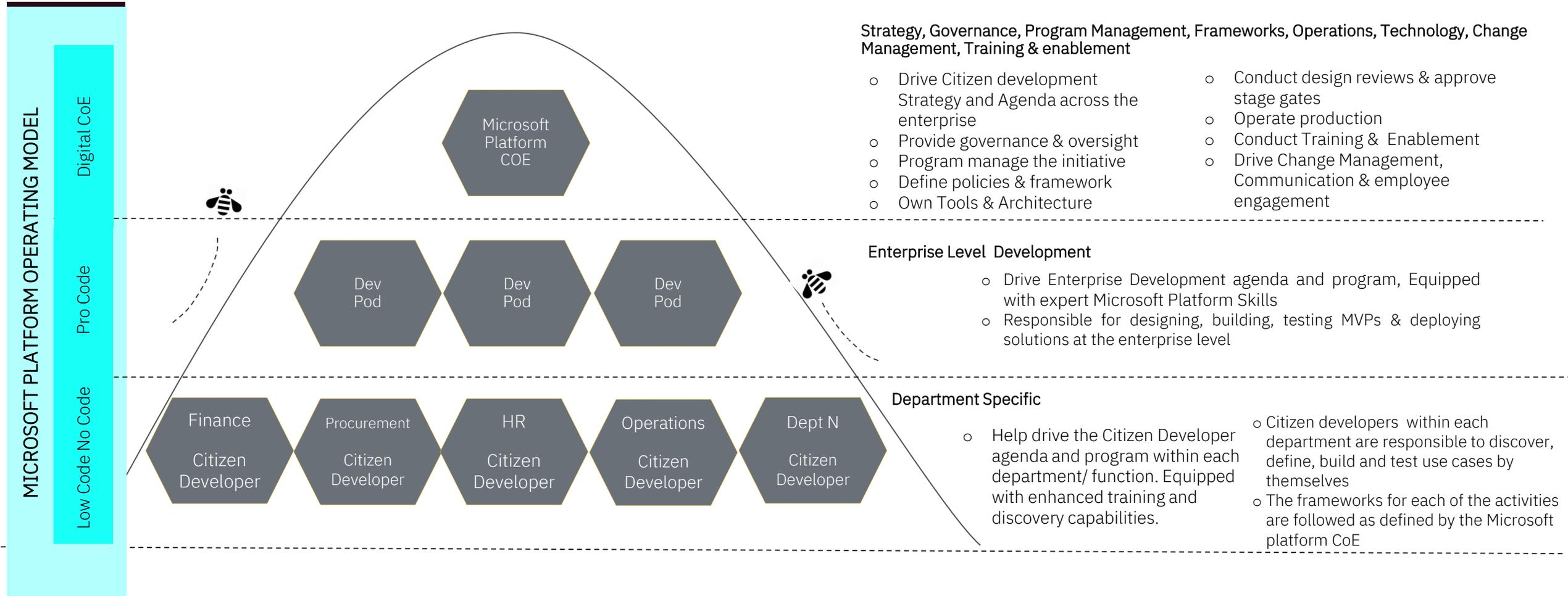


Client Team

Note: Team hierarchy illustration only; not actual resource count

Define Microsoft Platform COE Operating Model

A federated model to drive Citizen Development and Pro Development across an enterprise

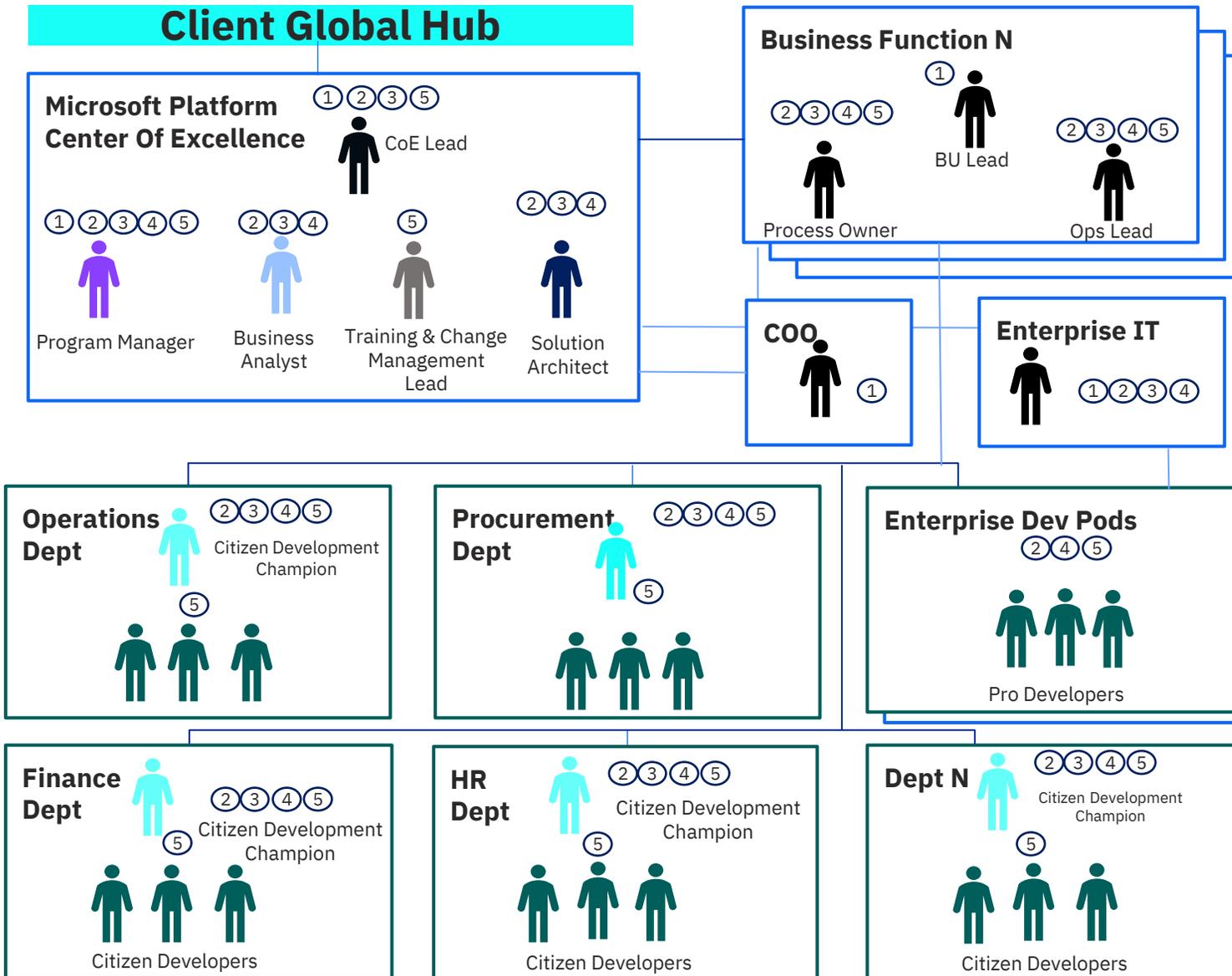


Define Responsibility Matrix

This model enables & empowers the Citizen developers of the Business Functions to be self sufficient on business & process related aspects to scale faster while the central platform, governance and enablement provides the required governance & control

	Microsoft Platform CoE	Enterprise Dev PODs	Citizen Developers
Steering & Governance	Defined and led by Automation CoE	Participate as per the agenda	Participate as per the agenda
Opportunity Management	Define Method and tools/ templates for process discovery, guidelines for opportunity categorization into enterprise or citizen approach	Identifying, qualifying and prioritizing the right opportunities for Automation	Owns own opportunities
Define, Design & Build	Define Best Practice, Template and Process and enable Citizen Developers	Define, design and build enterprise level complex use case	Discover and Envision
Test & Deploy	Define Best Practices, Template and Process and enable Citizen Developers	Conduct Testing and UAT. Responsible for Production Deployment	Participate to the testing.
Change Management	Execute Stakeholder management, creating visibility and champion the cause	Participate as per the agenda	Participate as per the agenda
Manage & Run	Define Best Practices, Template and Process	Handover the code to support team for run and manage	Responsible for run and manage of own automation (local deployment)
Microsoft Platform Adoption	Define Microsoft Platform with LC/NC capabilities. Create decision matrix & framework to use platform based on use cases	Use the enterprise grade Pro-code platform	Use low code no code platform
Training & Enablement	Define Training and enablement needs for both enterprise and citizen development and conduct education sessions. Define & Execute the Organization Change Mgmt. to drive Citizen Development across business	Guide Citizen Developers in respective Business Functions. Groom Champions for successful rollout (train-the-trainer model)	Participate in various training programs as per the role and need

Establish COE Governance Framework



COE Governance Meetings

- COE Steering Committee Review:**

Frequency: Monthly

Objective: Review progress of COE Program at Enterprise level

Attendees: COO, GH lead, CoE Lead, BU Lead, Program Manager
- COE Delivery Governance Review:**

Frequency: Fortnightly

Objective: Review of automation delivery - status updates

Attendees: CoE Lead, Program Manager, Solution Architect, Process Owners, Ops Lead, EA Developers, Citizen Development, Citizen Developer Champions, IT
- COE Backlog Review:**

Frequency: Fortnightly – Business Function specific

Objective: Review of opportunities across the Function

Attendees: CoE Lead, Program Manager, Solution Architect, Business analysts, Process Owners, Ops Lead, Citizen Development Champions, IT
- Technical Design Forum/ Design Authority:**

Frequency: Weekly

Objective: Review and alignment of solutions proposed

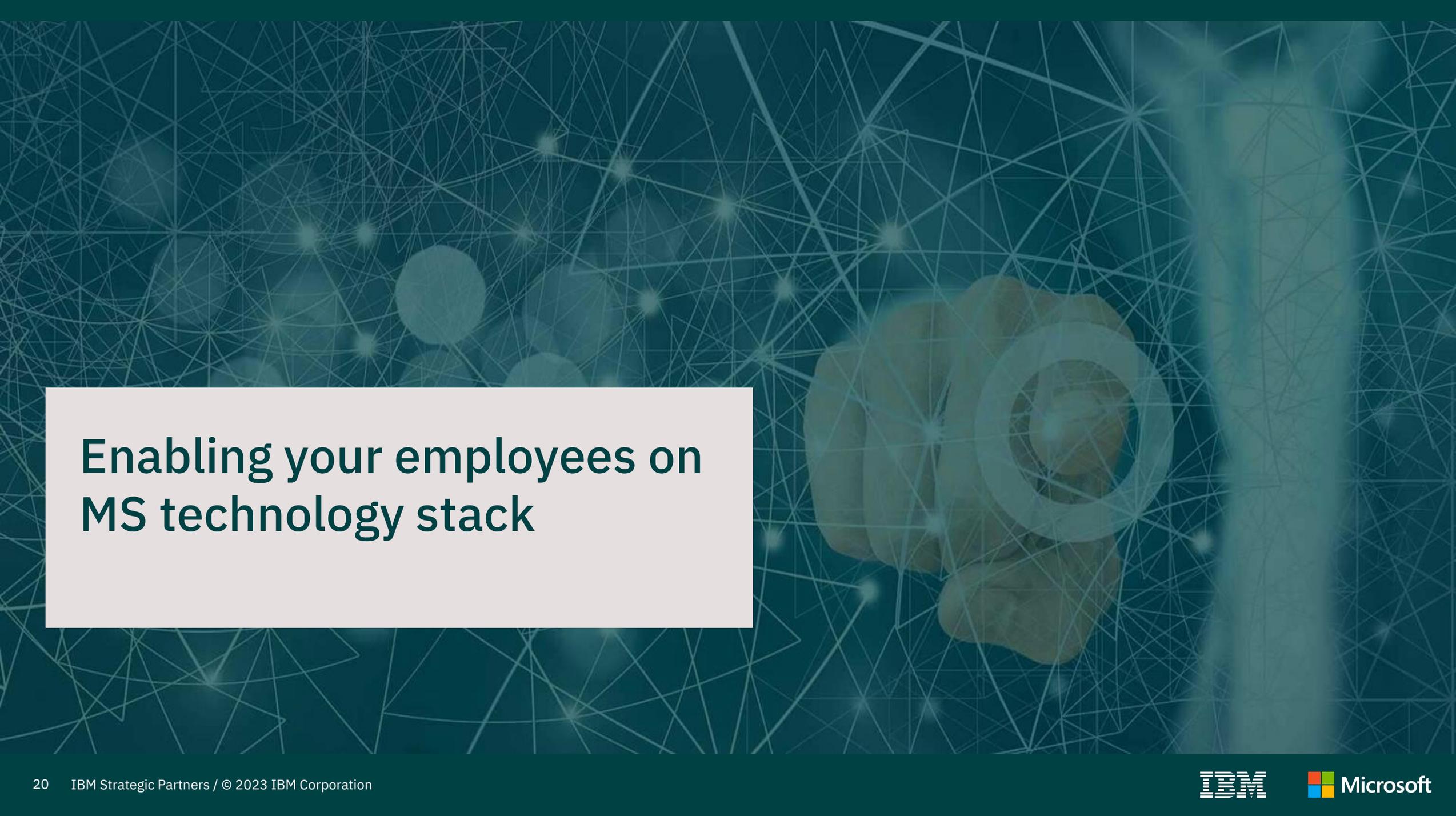
Attendees: Program Manager, Solution Architect, Business Analysts, Process Owner, Ops Leads, IT, Developers, Citizen Development Champions,
- Training & Organization Change Management:**

Frequency: Weekly – Business Function specific

Objective: Identify training needs, Communication and Organization change management

Attendees: CoE Lead, Program Manager, Training & Change Management Lead, Process Owner, Ops Lead, Developers, Citizen Development Champions, Citizen Developers

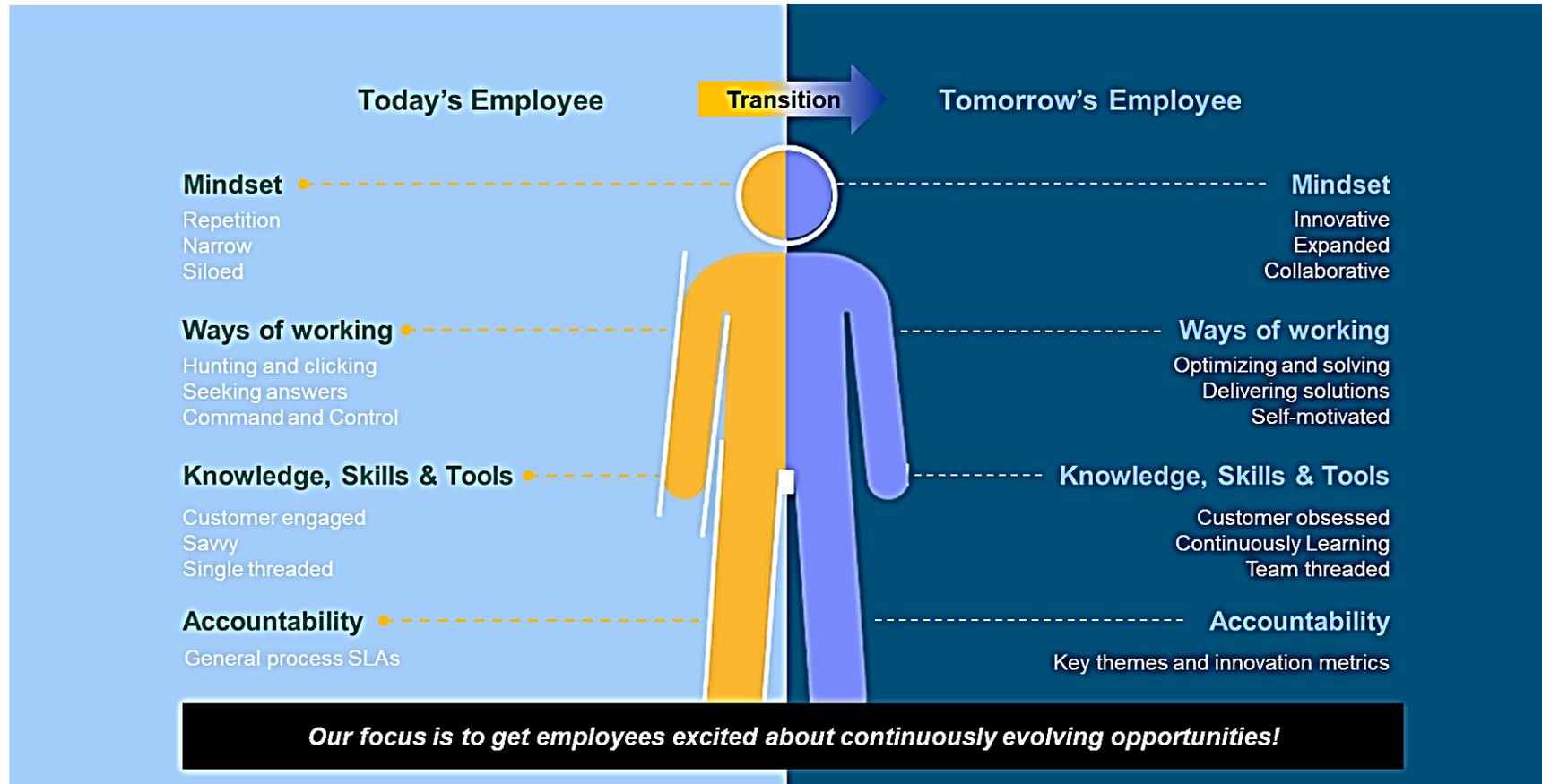
Business Functions – Finance, Procurement, HR, etc.

The background of the slide is a dark teal color with a complex network of thin white lines connecting various points, creating a mesh-like structure. Several points in the network are highlighted with small, bright white circles. On the right side of the slide, there is a semi-transparent image of a hand pointing towards the left. The hand is holding a glowing, circular icon that matches the style of the network nodes. The overall aesthetic is futuristic and technological.

Enabling your employees on MS technology stack

Enable employees on MS Technology stack

Microsoft CoE will help to create a structure through which employees can measure, experiment, and drive each other towards excellence



Power Platform adoption maturity model

All Links active, pointing you to publicly available Microsoft Material

	Organic (initial)	Repeatable	Defined	Scaled (capable)	Leading (efficient)
Scenarios	<ul style="list-style-type: none"> • Pockets of success and experimentation with Power Platform. • No strategy or governance approach. • Apps are team-based and supported by the makers. 	<ul style="list-style-type: none"> • Initial Power Platform controls implemented by a central team. • Starting to identify applications that are broadly used in the organization. 	<ul style="list-style-type: none"> • Standardizing repeatable practice. • Achieving measurable success to digitally transform their organization. • Defined Power Platform Center of Excellence team. 	<ul style="list-style-type: none"> • Standard processes in place for managing and monitoring Power Platform. • Capabilities are being used for enterprise-critical apps and integrations. • Platform champions have established channels. 	<ul style="list-style-type: none"> • Organization has proven the capabilities of Power Platform to transform mission-critical capabilities. • Established community of experts. • Fusion Teams enable legacy capabilities and modern cloud architecture to be used easily.
Activities	<ul style="list-style-type: none"> • Conduct training and awareness sessions. • Identify and execute Proof of Concept opportunities. • Reveal pockets of expertise through Power Platform Admin Center. • Conduct hackathons to identify and prove new use cases. 	<ul style="list-style-type: none"> • Demonstrate and install the CoE Starter Kit. • Build awareness of governance capabilities. • Establish initial environment and DLP policies. • Set up user support services. 	<ul style="list-style-type: none"> • Consult on organizational changes to manage Power Platform. • Advise on maturing processes to support more diverse use of the platform. • Establish KPIs and success metrics for the use and expansion of the platform. 	<ul style="list-style-type: none"> • Aid in automating governance processes and ALM. • Help build a champion network and create scaled communication. • Establish standard branding and app templates. 	<ul style="list-style-type: none"> • Integrate pro dev capabilities into organization's approach. • Evolve more advanced ALM automation and practices. • Help create Fusion Teams to enable legacy capabilities and modern cloud architecture.
Documentation	<ul style="list-style-type: none"> • Review nurture best practices • Monitor with the admin center 	<ul style="list-style-type: none"> • Set up the CoE Starter Kit • Help form governance policy • Create an environment 	<ul style="list-style-type: none"> • Learn about the CoE dashboard • Install CoE Starter Kit • CoE roles and responsibilities 	<ul style="list-style-type: none"> • Identify champions ALM with Power Platform • Share templates and reusable components 	<ul style="list-style-type: none"> • Get started with Dataverse Apply fusion development
Labs	<ul style="list-style-type: none"> • Instructor-led training kits Dataverse for Teams In a Day 		<ul style="list-style-type: none"> • Architect solutions for Power Platform 	<ul style="list-style-type: none"> • Package components in development environment Creating Power Apps reusable components 	<ul style="list-style-type: none"> • Run AI Builder In a Day Extending Power Platform Dataverse

MS Teams adoption maturity model

All Links active, pointing you to publicly available Microsoft Material

	Organic (initial)	Repeatable	Defined	Scaled (capable)	Leading (efficient)
Scenarios	<ul style="list-style-type: none"> Getting started with Microsoft Teams Planning your Adoption Plan your Governance and Security Assess your network Plan migration from S4B (when relevant) 	<ul style="list-style-type: none"> Create Champion Community Implement Governance Identify Compliance requirements Define usage scenarios Implement Security baseline 	<ul style="list-style-type: none"> Use Teams as primary meeting platform Expand collaboration to FLW and assess processes Implement External Collaboration (Guest Access) Implement Compliance requirements Monitor platform Usage Plan your employee experience strategy with Viva 	<ul style="list-style-type: none"> Expand pilot into production Improve productivity with product awareness and training Campaigns Migrated LOB application to MS Teams Created Custom application on Microsoft Teams Integrate Power Platform into Microsoft Teams to automate business processes 	<ul style="list-style-type: none"> Use Teams as primary Voice platform Implement Operation excellence for Voice and Meeting Transform your meeting room to support Hybrid Workload Assess exiting application and migrate capabilities into M365
Activities	<ul style="list-style-type: none"> Create you first Team and channel Define the adoption strategy and create a training plan for the users Select Early Adopter Assess network configuration and plan remediation Configure default organization policy for chat, meeting and calling If S4B is used, identify the migration approach towards Microsoft Teams 	<ul style="list-style-type: none"> Identify champion and create community engagement Configure governance best practices (e.g. teams creation policies, naming convention) Assess compliance business requirements Customize teams policies based on the identified sue case Configure Conditional Access, MFA for MS Teams 	<ul style="list-style-type: none"> Configure meeting policies including guest Configure MS Teams QoS Train the FLW champion Introduce and modernize business processes leveraging 1st party app. Configure Governance and Policy for Guest Access Create labels, retention policies, DLP and apply to Teams Measure user satisfaction using MS Form 	<ul style="list-style-type: none"> Create onboarding Teams channel with resources for employee (Adoption strategy) Organize training activities for user and connect them to the champs community Assess LOB applications and prepare a migration plan to modernize them / migrate them to low-code-no-code approach Publish existing Power Application into Teams 	<ul style="list-style-type: none"> Create Operation Excellence team to work on calling and meeting user experience leveraging CQD, Call Analytics, etc.. Implement advanced voice solution (Contact Center and Compliance Recording) Implement / transform meeting spaces into Meeting room using MTR solution Migrate third party or legacy solution into Teams
Documentation	<ul style="list-style-type: none"> Network Principles Teams Adoption Teams Governance 	<ul style="list-style-type: none"> Create Champions Program MS Teams Usage Scenarios MS Teams Security Baseline Configure Conditional Access Configure MFA Microsoft Teams Compliance 	<ul style="list-style-type: none"> Meeting in MS Teams Manage Meeting Policies Guest Access in MS Teams Manage External Access Compliance in Teams (all sections) Teams Usage Teams user training (including FWL) 	<ul style="list-style-type: none"> App Template for MS Teams Teams user training (including FWL) Configure Viva Learning Teams as a Platform (entire section - different topic for TaaP) MS Teams Usage Scenarios MCI workshop (Meetings and App) 	<ul style="list-style-type: none"> MCI workshop (Voice) Teams Phone - Plan PSTN Connectivity Options Teams Auto Attendant and Call Queue Teams Contact Center Teams Compliance Recording Teams Hybrid Meetings Teams Rooms
Labs			<ul style="list-style-type: none"> CDX Experiences Portal 		

MS Viva adoption maturity model



	Organic (initial)	Repeatable	Defined	Scaled (capable)	Leading (efficient)
Scenarios	<ul style="list-style-type: none"> How does my organization view EXP modernization Is my organization ready for Viva? How Viva and MS Teams work together 	<ul style="list-style-type: none"> Foster and grow employee connection using Viva Suite How do my users get the best value out of employee connections? 	<ul style="list-style-type: none"> How can my teams and individual employees improve their productivity and wellbeing? How can my managers and leaders work better with their teams in a hybrid working model? How do we capture, process, and actionize employee feedback? 	<ul style="list-style-type: none"> How to transform content into knowledge? How can I employees access the knowledge base efficiently? Surfacing relevant content and SME information in the flow of work for the employees 	<ul style="list-style-type: none"> How do I manage my OKRs? How do I make my employees connect to the organisational goals? How do I offer a comprehensive “in the flow of work” employee experience to my organisation? How do I connect this experience to improve the sales process at my organisation?
Activities	<ul style="list-style-type: none"> Define the objectives for EXP modernization. Define the roadmap for Viva Suite implementation Identify Data residency/compliance requirements Modernize the existing intranets Workshop to understand how Viva works with Teams 	<ul style="list-style-type: none"> Implement Viva Connections – customized to the user’s role. Define and design the communities for users to collaborate – Using Viva Engage. Integrate with Viva Amplify to elevate SLT messaging and vision. Identify integration requirements for data flowing into Viva Connections/Home 	<ul style="list-style-type: none"> Implement Viva Insights Personal and Advanced Analytics – Manager and Leader insights. Integrate employee feedback systems into Viva Insights. (Eg: Glint, Pulse, Qualtrics) Enrich with Microsoft Graph Measure adoption trends and monitor usage 	<ul style="list-style-type: none"> Content Management Systems to Knowledge Management Systems Implement Viva Topics and Viva Learning, Syntex Integrate with organization LMS/LXP Integrate with Teams, Viva Connections/Home 	<ul style="list-style-type: none"> Implement Viva Goals for OKR Single interconnected experience across M365 and Viva Roll out vertical Viva solutions – Viva Sales Viva Home as the single point of entry for all Viva modules.
Documentation	<ul style="list-style-type: none"> Getting Started with Viva Plan for Viva Modernize Sharepoint Viva Security and Compliance 	<ul style="list-style-type: none"> Setting up Viva Connections Viva Connections Extensibility Setting up Viva Engage Viva Engage Adoption Add Viva Connections for Microsoft Teams desktop 	<ul style="list-style-type: none"> Deploy Personal Insights Getting started with Workplace Analytics Viva Insights – Documentation hub Advanced insights Qualtrics Integration Microsoft Graph 	<ul style="list-style-type: none"> Setting up Viva Learning Setting up Viva Topics Setting up Microsoft Syntex Manage Content Sources in Viva Learning Get your environment ready for Microsoft Viva Topics Microsoft Docs 	<ul style="list-style-type: none"> Viva Goals Adoption Setting up Viva Goals Viva Sales Documentation Viva Developer Homepage
Labs	<ul style="list-style-type: none"> Viva Experiences are available at https://cdx.transform.microsoft.com/experiences 				

Dynamics 365 adoption maturity model

	Organic (initial)	Repeatable	Defined	Scaled (capable)	Leading (efficient)
Scenarios	<ul style="list-style-type: none"> Single departments using one app inside D365. No strategy for moving to next workload Siloed data 	<ul style="list-style-type: none"> D365 is deployed across departments or multiple apps being used. Planning for a unified platform and change management program. Identify Compliance Requirements. 	<ul style="list-style-type: none"> Well-defined and documented Employee Onboarding Guide and Training experience. D365 Solution solves business objectives across organization. Defined Center of Excellence Team 	<ul style="list-style-type: none"> DevOps for ALM Communicate value to the business for core scenarios. Regression Testing Strategy for updates/upgrades. 	<ul style="list-style-type: none"> Fully integrated ERP and CRM functionality across D365 platform enterprise wide. Innovate for additional business automation. Measured End User Adoption with Goals
Activities	<ul style="list-style-type: none"> Identify and map requirements Migration plan from legacy to D365 Training plan for users 	<ul style="list-style-type: none"> Asset Harvesting Align business timelines & implementation Identify interconnected business processes Train and notify users on new applications 	<ul style="list-style-type: none"> Involve SMEs Engage cross practice collaboration Leverage unified data analytics to drive business insights Document process updates and training guides 	<ul style="list-style-type: none"> Implement CI/CD Pipelines Allocate time for regression testing. Include performance tuning approaches Monitor business performance KPIs 	<ul style="list-style-type: none"> Identify processes for further automation and business improvement. Incorporate end user feedback to optimize business processes Continue to measure business performance KPIs Plan for future upgrades
Documentation	D365 Implementation Guide	Dynamics 365 documentation and training modules Microsoft Learn Dual Write Power Platform D365 FO Extensibility	Azure Synapse Link Dataverse FO Export to Data Lake	Build automation using CI/CD Power Platform Build Tools RSAT FO Analytics	One Version Updates Dataverse Releases
Labs	Dynamics 365 on Microsoft Learn Microsoft Learn Virtual Training Series (microsoft.com) MB-920T00A-Microsoft-Dynamics-365-Fundamentals-Finance-and-Operations-Apps (microsoftlearning.github.io)				



Next Steps & Value Propositions

Engagement Kick Off



2 WEEKS

SHOWCASE

- Showcase the key capabilities of Microsoft technology stack
 - Power Platform
 - MS Teams
 - MS Viva
 - Dynamics 365
- Understand and develop Strategic Vision for Microsoft Platform CoE
- Develop and validate CoE Operating Model, Team Structure and Roles and Responsibilities
- Define Governance structure and Communications Strategy



2 WEEKS

DISCOVER

- Conduct Garage jumpstart workshops to understand:
 - Key business processes
 - Personas
 - Key challenges
 - Expected business outcomes
- Identification of use cases for MVP to be developed across MS Tech Stack
- Define the adoption strategy and create a training plan to build a champion team



8 WEEKS*

BUILD MVP & ENABLE

- Implementation of identified use cases (MVP)
- Install the CoE Starter Kit
- Document best practices and advise on maturing processes to support more diverse use of the platform.
- Establish KPIs and success metrics for the use and expansion of the platform.
- Train the champion team on MS technology stack and prepare plan to connect employees to the champion team
- Conduct Envisioning workshops to identify next set of use cases and prepare a roadmap to streamline/automate/digitize processes and enhance collaboration



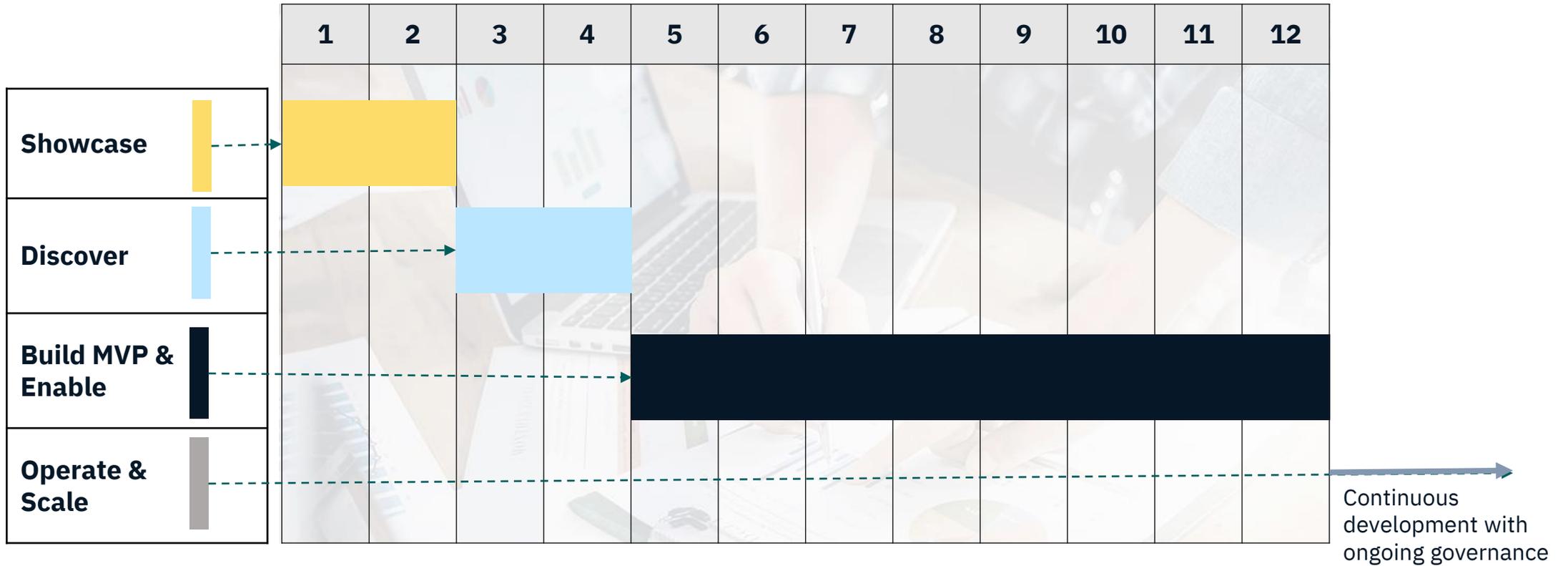
ONGOING

OPERATE & SCALE – CoE as a Service

- Continuous development and delivery based on Microsoft Technology stack as per the defined roadmap
- On-Going governance
- Continuously measure business performance KPIs
- Identify reusable components and setup component library to host them
- Establish channels for champion team and organize training activities for employees.

*Duration will depend on the scope of work & complexity of requirements

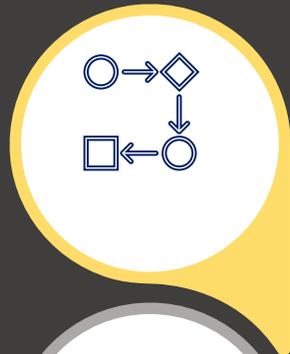
Timeline



IBM Microsoft Platform CoE – Value Propositions

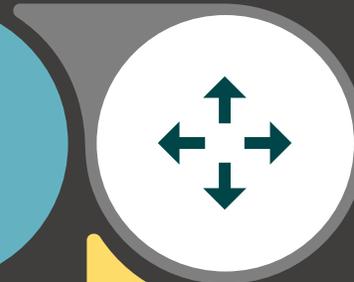
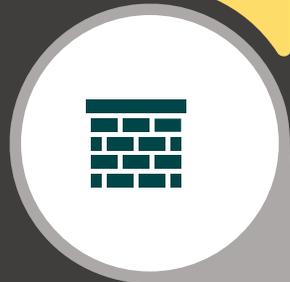
IBM's vast global expertise, experience and knowledge of Microsoft technologies can help the organizations to establish a core foundation (tools, people and processes) for driving lasting business value for employees and customers and developing an environment well-suited for successful adoption of game-changing solutions.

Enable new ways of working



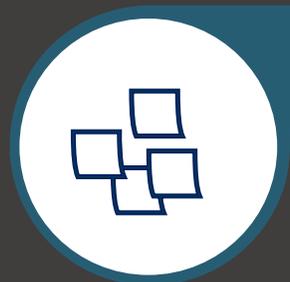
Enhanced collaboration by eliminating silos and fluid communication

Develop a strong foundation for embracing change



Strengthen governance mechanism

Reduction in operation costs by eliminating inefficient practices and optimizing resources



Enhance business agility and prepares the organization to respond proactively to change

