



## *Dynamics 365: High Level Scoping Proposal*

**Global  
Experience**

**Local  
Focus**

**100% AU  
Owned &  
Operated**

**iCatalyst**

*"iCatalyst was founded for the specific purpose to **bring together a team of industry veterans who had grown tired of the status quo in the Microsoft Dynamics space.** A belief that the **current consulting model brings dissatisfaction for the consultants and results in poor quality outcomes for the customers.** Our business is based on the philosophy that if our team are happy and engaged, then that will translate into **positive engagement with our customers**"*

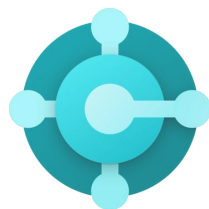
# SOLUTION CAPABILITY SNAPSHOT



**Dynamics 365  
Finance**



**Dynamics 365  
Supply Chain**



**Dynamics 365  
Business Central**



**Dynamics 365 Sales  
& Customer Service**



**Power Platform**



**Dynamics 365  
Project Operations**



**Power BI &  
Datawarehouse**



**Dynamics 365  
Customer Service**



**Azure Integration  
Services**



**Dynamics 365 Field  
Services**

# SERVICES CATALOGUE



## Microsoft Dynamics 365 Finance & Supply Chain

Microsoft Dynamics 365 Finance & SCM (previously called AX) ERP implementations, advisory upgrades, consulting, dual-writes, training, and support by highly experienced local professionals.

## Microsoft Dynamics 365 Business Central/Wiise

Microsoft Dynamics 365 Business Central & Wiise ERP implementations, upgrades, consulting, training, and support by highly experienced local professionals.

## Microsoft Dynamics 365 Sales & Power Platform

Microsoft Dynamics 365 Sales App (CRM), Marketing and Power Platform expertise including consulting, training and support by highly experienced local professionals.

## BI & Analytics

Jet Reports and Microsoft Power BI implementations, key users training, and on-going support including report and dashboard design, data source integration and advisory services.

## Microsoft Azure Integration Services

Design, build and manage Azure Integration Services – API Management, Logic Apps, Service Bus and Event Grid – these tools work together to provide a complete solution for integrating both cloud and on-premises applications

## Microsoft Dynamics 365 Managed & Support Services

Microsoft Dynamics NAV, AX & D365 BC, CE & FinOps ERP & CE advisory, upgrades, consulting, training and support services by highly experienced professionals with national reach.

## Project Delivery, Governance and Management

Project Management Office (PMO) and Project Methodology and Resourcing Advisory Services

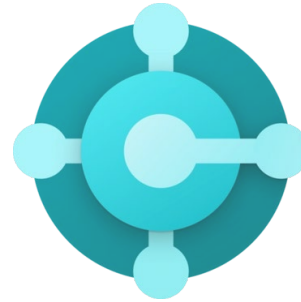
## Microsoft Dynamics Licensing & Subscriptions

Microsoft Dynamics NAV/Business Central and Finance, Supply Chain and Power BI licencing and subscription management services

# MICROSOFT DYNAMICS 365

- Microsoft managed software-as-a-service!
- Operates in the global, trusted, and secure Azure cloud platform
- Integrates with other Microsoft cloud services, including Office 365, Outlook, SharePoint, PowerApps, Microsoft Flow, and Power BI
- Regular feature updates

## Microsoft Dynamics 365 Business Central ERP



## Microsoft Dynamics 365 Customer Engagement (CRM, Customer Service)



## Microsoft Power Platform



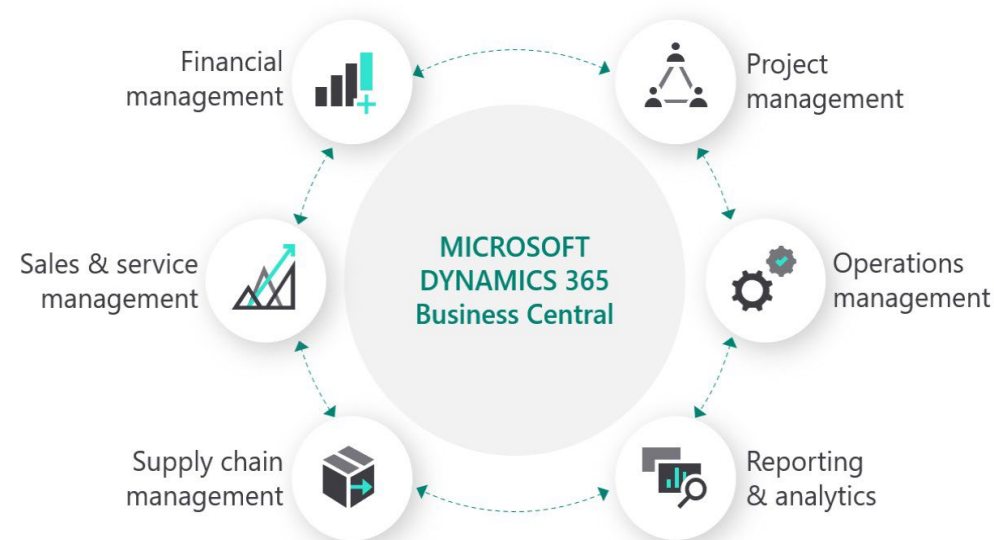


# MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Microsoft Dynamics 365 Business Central (formally named NAV and released in 2005) is Microsoft's most commonly used Enterprise Resource and Planning (ERP) solution worldwide with over 160,000 companies using it to run their operations.

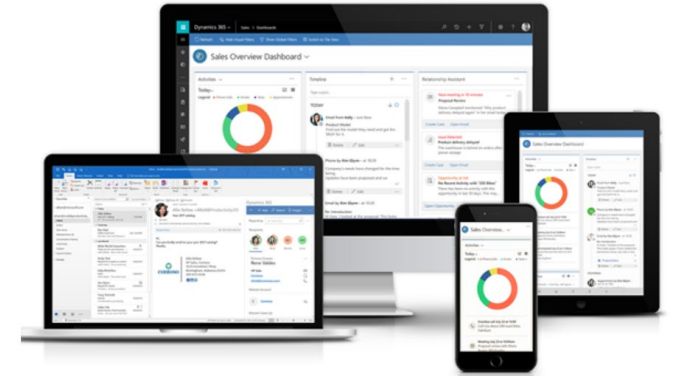
Microsoft Dynamics 365 Business Central provides:

- Comprehensive functionality across **Financial Management, Manufacturing, Supply Chain, Projects** and **Service Management**
- Cloud-based platform utilising Microsoft's Azure Cloud Infrastructure Australian Datacentres
- Automatic updates and new feature releases
- Role Tailored user experience based on job functions
- Consistent user experience across all devices
- Integration with Microsoft Office 365

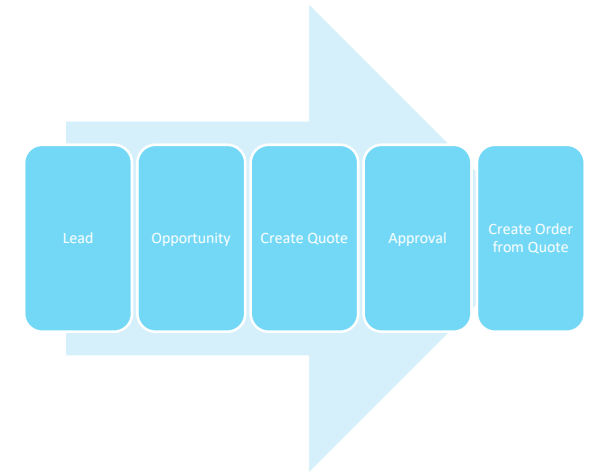


# MICROSOFT DYNAMICS 365 SALES

- Market Leading Client Relationship Management platform
- Integration with Office365
- Cloud based, scalable and feature rich
- Pre-built Sales Solution ready to use.
- Automation baked in.
- Single view of all client and prospect activities
- Ability to configure to match the way you work (Automation, Process, Data, More Apps!)
- Adapt to your sales Process
- Accessible from any device
- Integration to your Dynamics ERP
- Platform for financial reporting and insights across all your systems
- Future proof platform – keep you up to date with technology



Next Generation User Experience Optimized for Business



# POWER APPS & THE POWER PLATFORM



**Power BI**

Business analytics



**Power Apps**

Application development



**Power Automate**

Workflow automation



**Power Virtual Agents**

Intelligent virtual agents



**Data connectors**



**Portals**



**AI Builder**



**Microsoft Dataverse**



# OUR INDUSTRY FOCUS AND EXPERTISE

- Leverage our industry focus and expertise in;
  - Mining/Mining Services/Asset Intensive
  - Service Management / Workshop
  - Property Development
  - Assembly & Manufacturing
  - Project Accounting (Jobs)
  - Professional Services / Labour
  - Complex Projects
- We have developed IP in;
  - Manufacturing (BC/FinOps)
  - Implementation accelerates – process maps, scoping
  - Solution Accelerators - banking, rental, manufacturing
  - PowerBI – suits of reports – projects, financials
  - Managed Services and Support



# D365 SUPPORT AND MANAGED SERVICES



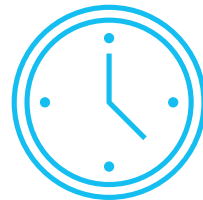
- iCatalyst offers ongoing Support & Management, Advisory and Engage services delivered by highly experienced Dynamics Consulting professionals and Support Operations resources
- We have service reach across ANZ and if needed, globally.
- Support and Management Services cover the breadth of your Dynamics 365 Platform – **Business Central, Finance and Supply Chain, Custom Engagement (CRM), Power BI, Azure Integration Services & Power Platform**
- Services include; **Service Desk Support, Issue Management, Reporting and Triage, Platform Release Management and more.**
- Detailed Agreements are provided, outlining T&C's, pricing and scope of services.



Improve Business  
Processes



Increase Productivity  
& ROI



Save Time and  
Resources



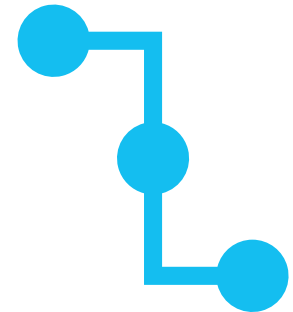
System Assurance &  
Best Practice



Access to Expertise

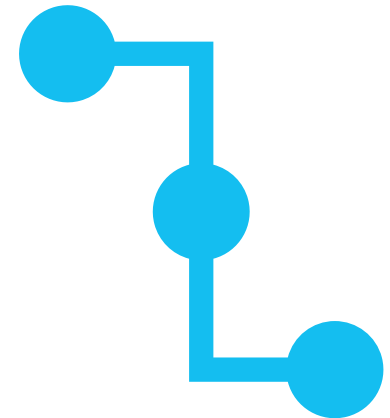
# SCOPING DEFINITION & PURPOSE

- A pre-implementation and pre-proposal consulting and advisory engagement used to determine the high level scope of a proposed implementation.
- The Scoping Workshops provide a forum for Subject Matter Experts (SME's) from your organisation to workshop business process and operational requirements with experienced consultants
- The objective is to define the high level functional scope of the future project and understand the key components/solutions required to meet your operational and strategic objectives
- Typically run over 1 or 2 x 4-6 hour workshops with your key stakeholders



# SCOPE AND ANALYSIS PHASE

- Define high level scope to ensure project scope covers all functional areas of the system to meet operational requirements
- High level analysis on requirements across all functional areas via a series of on-site workshops
- Review '**gap-fit**' to determine need for any 3<sup>rd</sup> party solutions and/or modifications
- Document High Level Scope - Solution Map & Solution Direction
- Note: Detailed configuration, gap-fit and design IS NOT included in the Scoping sessions or deliverables. These activities are included in the follow-on project delivery phases.



# DELIVERABLES

The key deliverables of the Scoping Project are:

- **Solution Direction document** – detailed information on key areas of the solution, including integrations, 3<sup>rd</sup> party solutions and identified modifications
- **Proposed Solution Map** – high level map of proposed software applications
- **Proposed Integration Map** -high level diagram showing integration requirements
- **Implementation Project Estimates** – detailed estimates for the required software and services
- **Project Timeline** – high level project timeline

# TYPICAL SCOPING WORKSHOP AGENDA

Workshop	Functional Area	Est. Time (hrs)
Workshop 1	Finance (AP, AR, FA, GL, Banking)	3
	Integrations	1
	Reporting	1
Total Workshop 1		~ 5 hours
Workshop 2	Job Costing and Projects	4
	Customer Relationship Management (CRM)	2
Total Workshop 2		~ 6 hours
Documentation		~ 20 hours



# SCOPING ENGAGEMENT FEES

- Our High Level Scoping Engagement are delivered as a fixed cost exercise (actual time spent exceeds the fees charges)
- We aim to provide value adding consultancy and documentation to provide assurance regarding the proposed ERP/CRM implementation
- Should you proceed with the ERP/CRM implementation with iCatalyst we leverage the Scoping phase during the Design Phase of the project

Consultant/s	Activity
<ul style="list-style-type: none"><li>• Dynamics 365 ERP Solution Architect/Consultant - Finance/Production/Supply Chain/Jobs</li><li>• Dynamics 365 CRM Solution Architect/Consultant – CRM, Sales, Marketing</li></ul>	<ul style="list-style-type: none"><li>• 2 x Workshops</li><li>• Documentation</li><li>• Deliverables Presentation</li></ul>
Total Fees	\$5,500 ex GST

# SCOPING WORKSHOPS

Ensure the personnel attending the workshops;

- Are prepared and understand the purpose and desired outcomes of the sessions
- Have intimate knowledge of the existing processes, but importantly intimate knowledge the designed business processes for optimal efficiency and productivity
- Have the authority to advise on your companies desired business processes
- Understand and can communicate your companies key differentiators in your chosen industry
- Have an open mind to adopting new systems and processes to transform your business
- Are not threatened or averse to change

There must be at least one person that is present in all the workshops that understands the “big picture” and key objective of the project.

# SCOPING TEAM

## Key members of our Delivery Team will include;

- Solution Architect – Dynamics Business Central
- Senior Functional Consultant – Finance/Operations

## Key Members of you Project Team will include;

- Executive Sponsor
- Subject Matter Expert/Process Owner – Operations/Jobs/Sales
- Subject Matter Expert/Process Owner – Finance
- Key Users – Functional Areas



# WHY PARTNER WITH US?

**Global  
Experience**

**Local  
Focus &  
Expertise**

**100% WA  
Owned &  
Operated**

**Highly  
Reputable**

**iCatalyst**

# THANK YOU

[icatalyst.com.au](http://icatalyst.com.au)