Velosio®

What's *your* next?

Digital Transformation

Client Pitch Deck
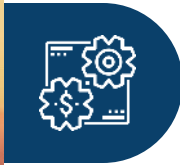
Velosio at a glance...

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Microsoft

Microsoft Dynamics
- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management
- Dynamics 365 BC

- Dynamics 365 CRM
- Dynamics GP
- Dynamics NAV
- Dynamics SL

Productivity & Analytics
- Microsoft 365
- Power Apps / Power Virtual Agents
- Power Automate
- Power BI

Cloud
- Azure Services
- Managed Services
- Security Services
- Cloud Migration

Microsoft Certified
- ISV Development Center

Solution and Services

Solution Highlights
- **AXIO** Enhanced Framework for Dynamics 365 Finance
- **AXIO** Advanced Projects for Dynamics 365 Finance
- **AXIO** Distribution for Dynamics 365 Finance
- **Progressus** Advanced Projects for Dynamics 365 Business Central

Services Highlights
Packaged Migration Services
- Fixed-Price Upgrade and Migration from Dynamics OnPrem to Cloud
- Dynamics GP, NAV or SL to D365 BC

Power Platform Quick Start
- Rapid, fixed price solution development
- Accelerate your Power Apps, Power Automate or Power BI solution build and deployment

Competency Certifications

Microsoft Partner
Microsoft

Application Development	Communications
Application Integration	Data Analytics
Cloud Business Applications	Enterprise Resource Planning
Cloud Platform	Project and Portfolio Management
Cloud Productivity	Small and Midmarket Cloud Solutions
Collaboration and Content	Windows and Devices

Industry & Expertise

Industry
- Project-Driven; Professional Services
- Greenhouse Growers and Horticulture
- Industrial Equipment
- Distribution
- Commercial HVAC
- Non-Profit and Membership

Expertise
D365 Finance & Supply Chain Management
- Rapid Install, Low Risk, Low TCO

D365 CE
- All workloads with strength in Field Service and Project Operations

D365 Business Central

About Us

| 33+ years' experience | 400+ team members | 4,000+ clients | 12,000 Projects | www.velosio.com | Insier@Velosio.com | 888-725-2555 |

Velosio by the Numbers

4,000 Clients

400 Employees

150 Affiliates

33 Years

96% Client Retention

50+ Industry Awards

12,000 Successful Projects

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Achievements & Recognition:

Microsoft Gold Competencies:

- Application Development
- Application Integration
- Cloud Business Applications
- Cloud Platform
- Cloud Productivity
- Collaboration and Content
- Communications
- Data Analytics
- Enterprise Resource Planning
- Project and Portfolio Management
- Small and Midmarket Cloud Solutions
- Windows and Devices

FY21 EAGLE AWARD
Honoring Business Excellence
in Microsoft Dynamics 365

DARE TO SOAR

2021 BUSINESS APPLICATIONS
MICROSOFT INNER CIRCLE
25-TIME AWARD WINNER

2021 DYNAMICS 365 BUSINESS CENTRAL
US PARTNER OF THE YEAR
WINNER

2021 INDIRECT PROVIDER
WW PARTNER OF THE YEAR
FINALIST

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Bob Scott's
2021 TOP 100 VARS

Microsoft
Gold Partner

Avalara
The Orange Star
2021 Winner

CLIENTS

Benefit from an entire ecosystem of *integrated product solutions and technology* designed to support *your* business **end-to-end.**

Microsoft Dynamics	Microsoft Azure Cloud	Microsoft 365	Power Platform	Industry Solutions & ISV Add-ons	Additional Services

Dynamics 365

Business Central

Dynamics GP

Dynamics NAV

Dynamics SL

Cloud Migration Data Sync

Readiness Assessments

Cloud Hosting

Power BI

Power Automate

Power Apps

Power Virtual Agents
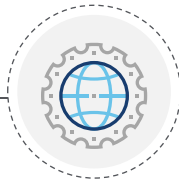
Over 200+ Strategic ISV and Industry Add-on Solutions

Managed Services

Dynamics Migration to Dynamics 365

Support Services

Development Services

Reporting & Analytics

Digital Transformation Advisory

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Enabling Solutions for Business

A comprehensive range of purpose-built solutions, services, and programs let our clients enjoy the long-term benefit of working with **a partner that knows their business** and has a **personal stake in their success**.

Accounting
and ERP

Customer
Relationship
Management (CRM)

Power Platform
Data Management
Enterprise Integration

Talent
Management

Industry
Solutions

PSA
Field Service
(FSA)

Office
Productivity

Analytics and
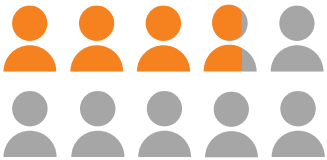Business Intelligence

Public, Private and
Hybrid Cloud Services

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Four Key Trends, Driving Global Digital Transformation

Companies are innovating & leveraging new technology to scale

Benefits from focused tech intensity

Lines between & within industries will blur with the help of Big Data

Corporate culture has shifted

73%
of companies report they are currently creating their own first-party intellectual property (IP), using next-generation technologies such as machine learning (39%), IoT (37%), AI (32%), & blockchain (29%).

>83%
of companies believe they need to embrace tech intensity to be successful in the future.
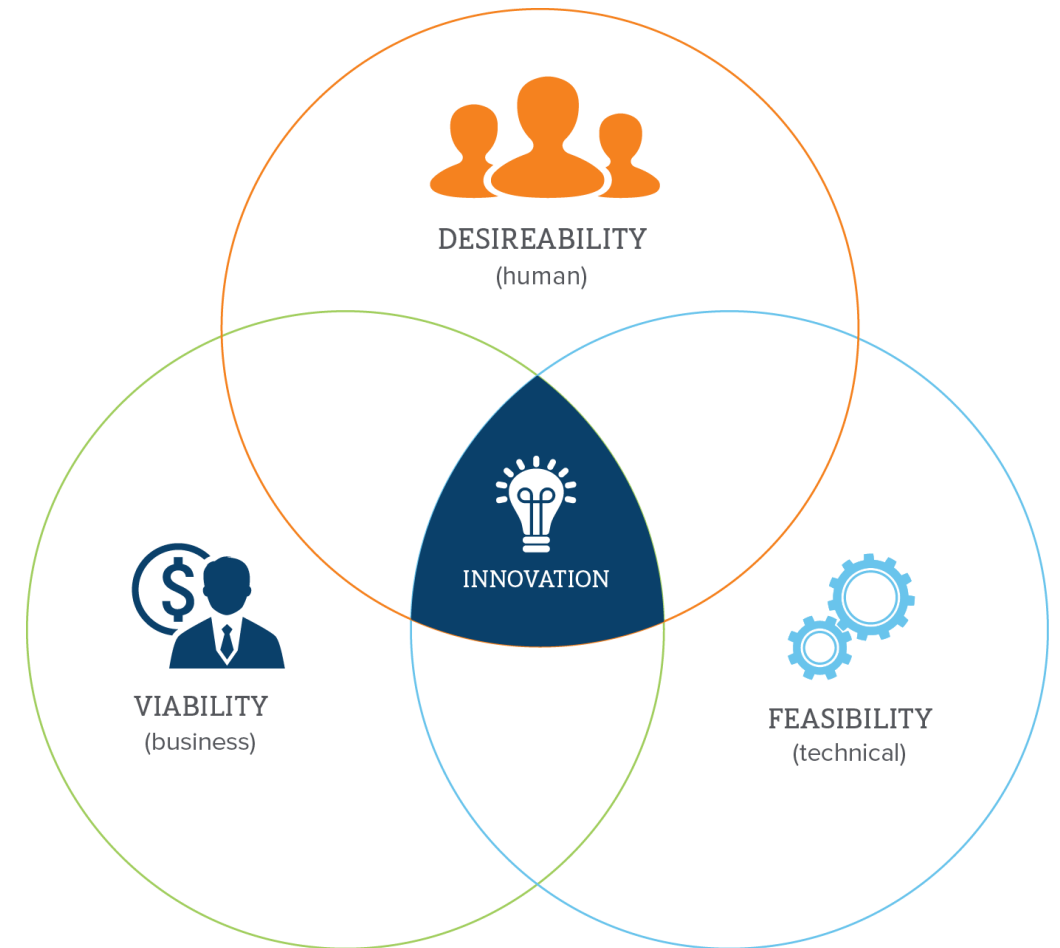
36%
of companies believe digital advancements will make the global economic playing field more level. Advanced data insights reduce competitive barriers.

70%
of business leaders believe it is paramount to work for an organization that keeps up with software and application trends.

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Velosio *Digital NEXT* Overview

- A structured & strategic solution, leveraging upgrades in technologies & processes, that drive optimizations within a business & it's customer-base

- Proactive advisory services, with a deeper & more detailed discovery cycle, to create a robust & concrete foundation.

- We provide expert guidance to envision & achieve a technological & process enhancement plan

- We offer an essential foundation to utilizing best-in-class technologies & support services, focusing on business-related outcomes, not just technology improvements

- We deliver a Proposed Solution Roadmap, detailing planned phases of deployments & innovations, along with change management, adoption, and process optimization services.

DESIREABILITY
(human)

INNOVATION

VIABILITY
(business)

FEASIBILITY
(technical)

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The Velosio *Digital Next Roadmap*
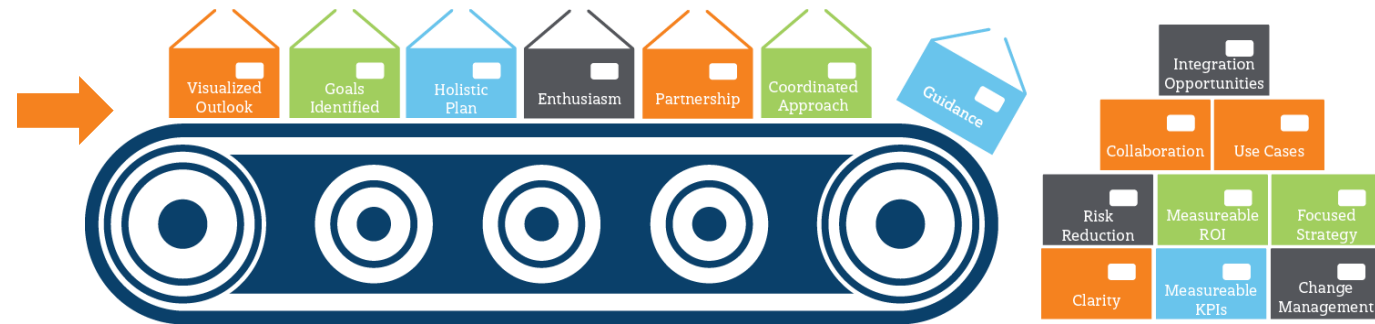
A collaborative & strategic approach that eliminates siloed solutions

- Key impactors for DX: Focusing on iterative & innovative deployments of technology, that drive the following business outcomes:
    - 1) Better efficiency - workforce enablement
    - 2) Improved productivity, flexibility, & operational agility
    - 3) Improved customer experience & an improved competitive advantage
    - 4) Higher level of security
    - 5) Reduced operating costs
    - 6) Impactful & insightful data analytics & intelligence

Velosio *IDEATE* Framework

2

Design
(aka Plan)

- Mutually finalize the scope
- Strategic Value Map
- Present additional use cases
- Business Value Assessment
- Cost/Benefit Analysis

1

Inspire
(aka Discovery)

- Introductions/defining set of objectives & strategy
- Scoping activities
- Shaping goals of the initiative(s)
- Defining key stakeholders
- Data gathering & deep-dive into processes and data

3

Empower
(aka Execute)

- Solution assessments
- Organize touch-base cadences
- Select path forward
- Develop phased project plan

6

Experience

- Optimize
- Augment
- Ongoing Support
  - Technical
  - Functional
  - Strategic
- Innovate to the Next Phase

VELOSIO DX IDEATE FRAMEWORK

4

Achieve
(aka Develop)

- Development of solution
- Demo environments
- Testing

5

Transition

- Change Management
- Adoption
- Go-live
- Monitor

Digital NEXT Roadmap: Process

Describe the current state
and Envision the future state

Include phases, timeline, and
expected business outcomes

Envisioning Workshop

Create a Roadmap

1   **2**   **3**   **4**   **5**

Define the Strategy

Investigate

Build a Pilot

Define direction, investments and
how to enable transformation

Review the technologies available.
Define the business impact

Create a solution that addresses
and supports the business need

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Digital Next Roadmap: Stages & Outcomes

Stage 1	Stage 2	Stage 3	Stage 4	Deployment
Discovery	Planning	Execution	Development	Optimize
Business Strategy Alignment —— DX Envisioning Workshops	Executive Summary —— Business Value Assessment	Solution Assessment —— DX Solution Project Plan	Kick-off Phase 1 —— Solution Demo Presentations	Change Management —— Go-live
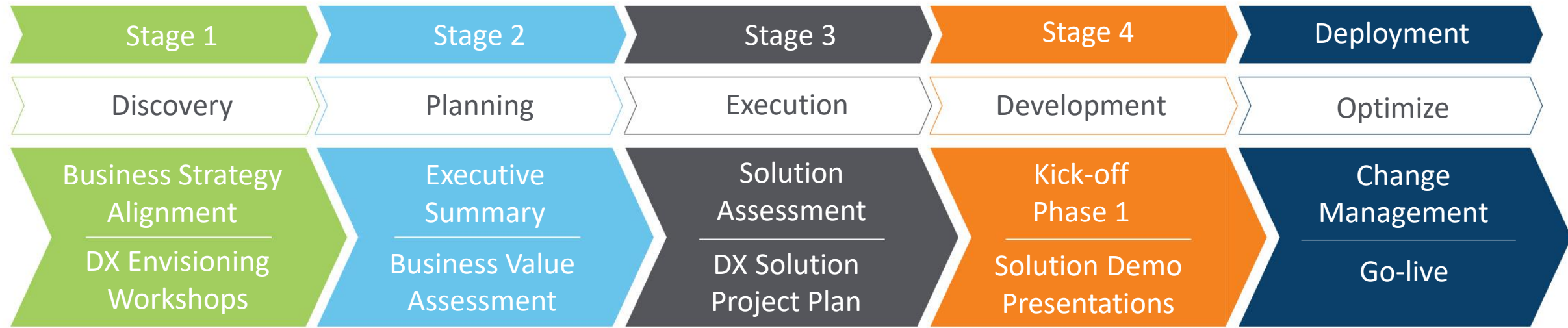
Outcomes:

- Key Stakeholders identified
- Daily Operations documented
- Additional use cases defined

- ROI/KPIs identified
- *Strategic Value Map* – goals tied to platform/solution capabilities
- Cost/benefit analysis
- Alignment w/stakeholders

- Benefits-driven *DX Solution Project Plan,* i.e.: current state to future state, project plan, & risk assessment/mitigations
- Alignment w/stakeholders

- Showcase progress on **phased** solution environments
- Demo sessions conducted, as increments are completed
- Collaborative & strategic DX advisory. Process & SOP enhancements. Full change management & adoption support.

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Digital NEXT Roadmap: Key Outcomes

- Our DX Assessment is a coordinated & unbiased engagement, that delivers the following assets:

Discovery	Planning	Execution
DX Envisioning Workshops & Documentation	DX Business Value Assessment & Cost/Benefit	DX Solutioning & Phased Project Plan/Roadmap

Velosio®

Why our clients can rely on Velosio

Depth and Breadth of Mid-Market Solutions

- ERP, CRM, Productivity, BI, and Power Platform
- Entire MS Dynamics portfolio, Microsoft 365 and Azure
- Experience with over 240 Microsoft ISV solutions
- Proprietary Velosio Industry IP

Stature with Microsoft is unmatched

- Microsoft Inner Circle (26 years)
- Over 40 industry, solution and growth awards from Microsoft
- Only Microsoft Cloud Distributor (iCSP) that specializes in Dynamics 365
- Certified MS Dev Center

Size, scale and reach means we're there for you

- 400+ professionals
- 4,000+ clients
- Onshore, Nearshore and Offshore Development resources at the ready
- 96% client retention rate

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