

Dynamics 365 Transformation Toolkit for Banks and Credit Unions

Powered by Microsoft Dynamics 365



Transform your business with BDO's Dynamics 365 Transformation Toolkit for Credit Unions

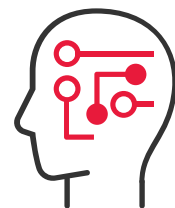
BDO's Banks Credit Union Toolkit provides a unique set of tools, accelerators, and business strategies for Banks and Credit Unions, powered by Microsoft Dynamics 365.

BDO's Transformation Toolkit empowers companies to transform challenges into strategic opportunities for growth and innovation, breaking free from digital concrete.

We look forward to helping you achieve your business application goals. **Faster.**



50,000+ GLOBAL CUSTOMERS



250+ DYNAMICS AND DATA SPECIALISTS

BDO's Dynamics 365 Transformation Toolkit for Banks and Credit Unions

BDO's transformation approach focuses on **outcomes**, **process improvement**, and **organizational change management** to ensure maximum return on your investment. BDO brings proven Banks & Credit Union industry experience to lead your organization through transformation, delivering solutions that blend industry best practices with your company's unique set of goals.

TYPICAL CLIENT CONCERNS



Customer Data Strategy

Eliminate siloed data across marketing, sales, and customer service increasing customer loyalty



Data Integrity

Ensure client data is accurate, consistent, and reliable improving operational performance and customer service levels



Scalable Digital Foundation

Expand application capabilities allowing adaptability to changing customer needs



Customer Loyalty

Facilitate targeted campaigns, track engagement and analyze ROI to strengthen customer relationships

HOW BDO CAN HELP



A Comprehensive Strategy - BDO will help you determine the best path for long-term business applications excellence



Operational Efficiencies - Deploy pre-built solutions to reduce operational costs with data management



Data Integration and Reporting - Integrate industry ERP systems and customer data into a single, modern data platform



Software Accelerators - Optimize customer relationships with integration between industry tools and platforms

BDO's Dynamics 365 Transformation Toolkit for Banks and Credit Union Implementation

BDO's Dynamics 365 Transformation Toolkit for Banks and Credit Unions Implementation will employ a structured approach to help your organization **define a solution, assess readiness, and get expert support** to achieve your desired business outcomes.

Estimated project timeline:

We estimate this implementation to take 6-12 months

Typical implementation includes:

- ▶ Process Review and Optimization
- ▶ Program Management Accelerators
- ▶ Dynamics 365 Templates and Prescriptive Configurations for Banks and Credit Unions
- ▶ Custom Reporting and Analytics Dashboards
- ▶ Software Accelerators for Customer Loyalty programs and New Customer Acquisition



PHASE 1 Alignment and Strategy

In-depth consultation to understand your business needs, and current pain points

PHASE 2 Design and Implementation

Implement targeted Dynamics 365 solutions to achieve your desired business outcomes

PHASE 3 KPI's and Feedback

Implement the required reports and dashboards to measure process effectiveness and support continuous improvement

PHASE 4 Deployment and Change Management

In-depth training to drive user adoption and consistency

Trust BDO as your Microsoft Partner

Strategic Alliance for your Success

Microsoft Practice by the numbers:

450+ Microsoft Certified Professionals

250+ Certified Dynamics 365 and Data Specialists

\$585M+ Technology Solutions Delivered

130+ Cloud Solution Provider Clients

[CLICK TO LEARN MORE ►](#)



PEOPLE

119,000+



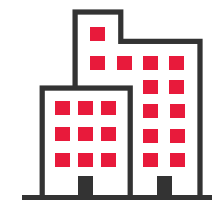
BDO DIGITAL
PROFESSIONALS

12,000



COUNTRIES AND
TERRITORIES

166



OFFICES

1,800

‘BDO’, ‘we’, ‘us’, and ‘our’ refer to one or more of BDO International Limited, its network of independent member firms (‘the BDO network’), and their related entities.

The BDO network is an international network of independent public accounting, tax and advisory firms which are members of BDO International Limited and perform professional services under the name and style of BDO (hereafter: ‘BDO Member Firms’). BDO International Limited is a UK company limited by guarantee. It is the governing entity of the BDO network.

Service provision within the BDO network is coordinated by Brussels Worldwide Services BV, a limited liability company incorporated in Belgium. Each of BDO International Limited, Brussels Worldwide Services BV and the BDO Member Firms is a separate legal entity and has no liability for another entity’s acts or omissions. Nothing in the arrangements or rules of the BDO network shall constitute or imply an agency relationship or a partnership between BDO International Limited, Brussels Worldwide Services BV and/or the BDO Member Firms. Neither BDO International Limited nor any other central entities of the BDO network provide services to clients.

BDO is the brand name for the BDO network and for each of the BDO Member Firms.

© Brussels Worldwide Services

