

TEKenable

TEKENABLE

Dynamics 365 Review Proposal



TEKenable are Experts in Rapid Digital Transformation through Low Code Platforms. We are a technology company delivering the latest innovative business solutions to forward-thinking public and private enterprises in Ireland the UK, Europe and the Middle East.

We deliver Rapid Digital Transformation by combining our unique consulting approach to People (change) and Process with the latest technology platforms to help you build a real business advantage. As market demands continuously change, we blend innovative thinking and breakthrough technologies to produce game changing results through improved cost savings, operational efficiencies, and enhanced customer experience.

ISO 27001, 13485 and 9001 certified we have global reach with offices in Ireland, UK, Spain, Hungary & UAE and expertise across Healthcare, Financial Services, and Public Sector.

In 2019 we were named Technology Business of the Year, we were listed in the Deloitte Fast50 in 2019, 2020 and 2021 and won the Deloitte Impact Award for Technology in 2019.

To cap it all, we are Microsoft Partner of the year for Business Applications 2021 and a Salesforce Partner and License Reseller delivering Sales, Service, Marketing, CPQ & Billing, Commerce and Financial Services Clouds, and Custom extensions and applications.

2021 Winner

Microsoft Partner

Microsoft Business Applications Partner of the Year



Our range of services are outlined below If you'd like to find out more about how we can help support your digital transformation journey. Visit us at <https://www.tekenable.ie>



CONTENTS

Overview	6
Discovery	8
Review Findings	9
Recommendations	10
Pricing	11



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Freedom of Information

TEKENABLE regards the content of this document to be commercially sensitive and confidential regarding the approach described the project plan, costs and staffing details.

Account Contacts

Queries in relation to this document may be addressed to either of:

NAME		
JOB TITLE	Account Manager	Service Delivery Manager
KEY CONTACT	Account Matters	Project Matters
EMAIL		
TELEPHONE	+353 1 681 4098	+353 1 681 4098



Version Control

Version #	Date	Comment
1.0	01/01/2023	Initial draft

Related Documents

Document Name	Comment

Document Conventions

Convention	
Within the document paragraphs may be commented with "Developer Notes". This is to bring attention to some special feature that may not be clear from the screenshot.	<u>DEVELOPER NOTE:</u>
Within the document paragraphs may be commented with "Important Notes". This is to bring attention to some special feature that may not be clear to the business from the screen mock-up.	<u>IMPORTANT NOTE:</u>

DISCLAIMER

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OVERVIEW

Microsoft Dynamics 365 is a portfolio of intelligent business applications that delivers superior operational efficiency and breakthrough customer experiences, enabling businesses to become more agile and reduce complexity without increasing costs.

The Dynamics 365 suite of modular, prebuilt applications can help your organisation to grow, evolve and transform and can deliver benefits such as:

- ◆ Improved productivity and efficiency
- ◆ Better customer engagement
- ◆ Enhanced data security and compliance
- ◆ Increased flexibility and scalability
- ◆ Reduced costs

As you deploy Microsoft Dynamics 365 in your environment, custom integrations and automated workflows help you realise the full potential of your investment. However, these can lead to risks around security, data integrity, performance, and compatibility.

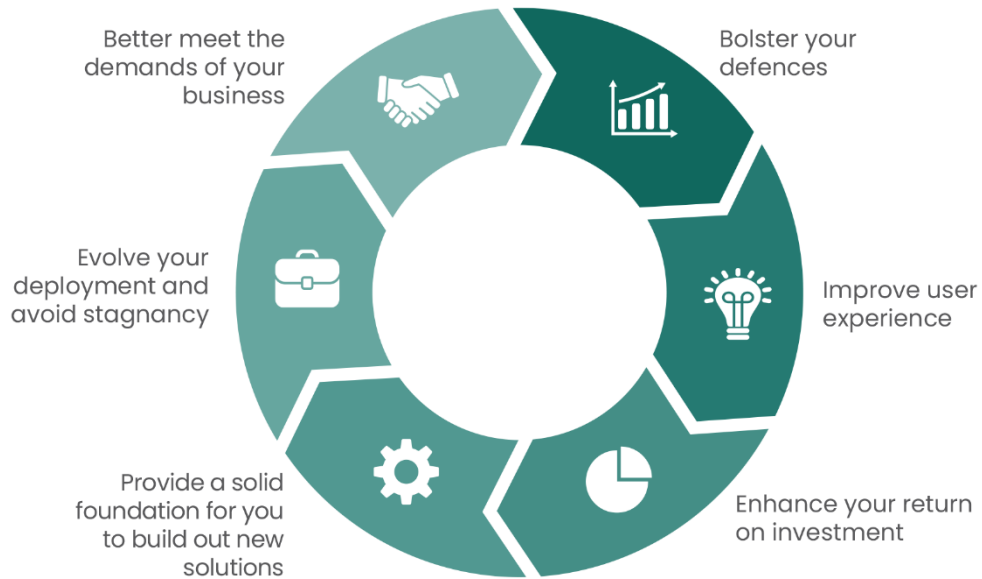
Our Microsoft Dynamics 365 Review is designed to help you unlock the full potential of your Dynamics 365 investment, by providing a high-level analysis of your current implementation and identifying areas for improvement. TEKenable's team of experienced Dynamics 365 consultants will work closely with you to understand your unique business needs and challenges. We will conduct a review of your current Dynamics 365 configuration against Microsoft best practices under the following headings:

- ◆ Technical
- ◆ Governance
- ◆ Adoption

Based on the findings of the review, we will provide you with a report outlining our findings. This report will include action items and recommendations for improving your Dynamics 365 implementation. Our team will also be available to provide training, ongoing support, and guidance as you look to implement the recommended changes.

With TEKenable's Dynamics 365 Review, you can rest assured that you are getting the most out of your investment in the platform. We aim to:





We have outlined the process we will undertake as part of our Microsoft Dynamics 365 review and look forward to discussing this in more detail with you.



DISCOVERY

During this phase of our review, we will kick off with a call to outline the information required to undertake the exercise. Following the call, we will:

- ◆ Review system documentation. This may include but is not limited to:
 - End user guides/videos
 - Technical documentation
 - Third party integrations/services
- ◆ Understand current release management practices
- ◆ Discuss the system in workshops with client consultations to understand issues or pain points.
- ◆

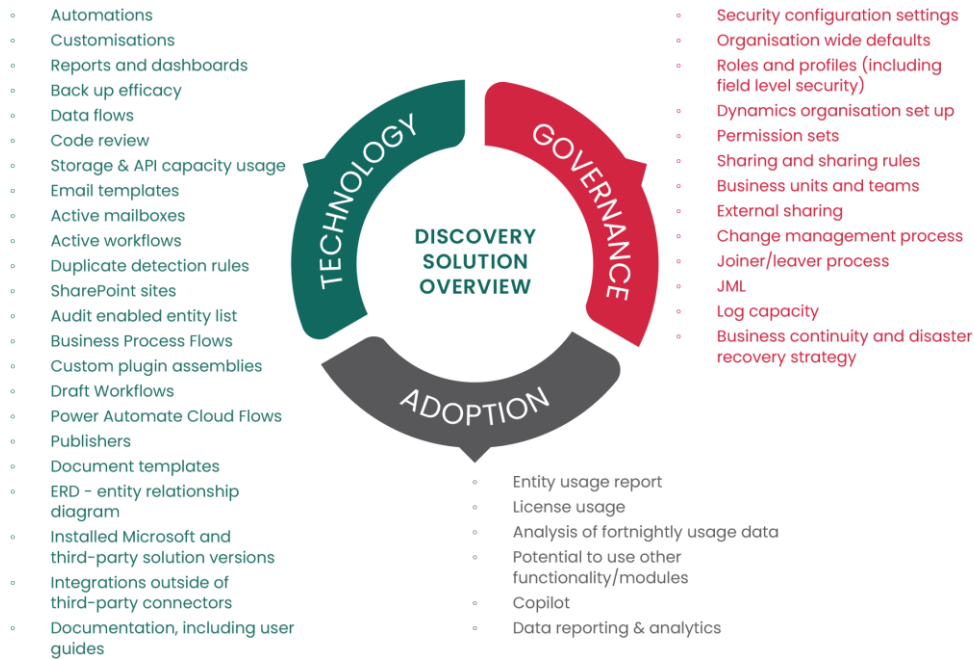
At this point in the process, we will gain secure access to your tenant environment with the Dynamics Administrator role. Our discovery process starts to review:

- ◆ Capacities for storage, API and licensing
- ◆ Add-ons allocated to any of the environments
- ◆ ALM (Application Lifecycle Management) process
- ◆ No code customisations and solution layering strategies
- ◆ Source code
- ◆ Security roles matrix
- ◆ Installed Dynamics 365 applications
- ◆ Server to server integrations with SharePoint and Exchange Online
- ◆ Any third-party solutions installed in the environment i.e., DocuSign
- ◆ Document generation processes and templates
- ◆ Power Automate cloud flows
- ◆ Background workflow processes and business process flows
- ◆ Outgoing communication processes and templates i.e., email, SMS
- ◆ Business rules
- ◆ Client-side Java script customisations
- ◆ API Integrations to third party SaaS or on-premises services



REVIEW FINDINGS

Like the other aspects of the Microsoft Dynamics 365 review, this portion of the engagement takes place remotely. Our experienced team of consultants will assess your environment based on what has been outlined during our discovery process. We document the following deliverables in our Discovery Solution Overview document and associated attachments:



With over twenty years of experience, our team has deployed Microsoft Dynamics 365 for scores of customers and has also reviewed many existing deployments.



RECOMMENDATIONS

Following a comprehensive assessment of your Microsoft Dynamics 365 environment, the team review all the discovery items with a Senior Solution Architect, who recommends mitigation for any risks and implementation of our best practice approach where we deem appropriate. Typical areas for improvement are:



Implementation of ALM



Access required for source code from previous vendors



Upgrade of redundant or deprecated code blocks



Advise on upcoming features that are marked for deprecation that you rely on and suggest workarounds



Recommend strategies to ensure any capacity overages are managed and mitigated



Recommend improvements in security posture

By way of follow up to the report, we will present a summary to your team, identifying priorities and interdependencies. At this juncture you may wish to carry out any remedial works inhouse, alternatively we can scope out the Professional Services effort required to have the TEKenable team carry these out.



PRICING

Our Dynamics365 Review is priced based on size and complexity of the existing implementation and can range from €5,000 to €15,000.

If there are particular areas that you would like us to include or exclude from the discovery, we are happy to tailor it to your interests/needs.



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