**DYNAMICSPACT**
Global Microsoft Dynamics 365

*This presentation contains confidential data*
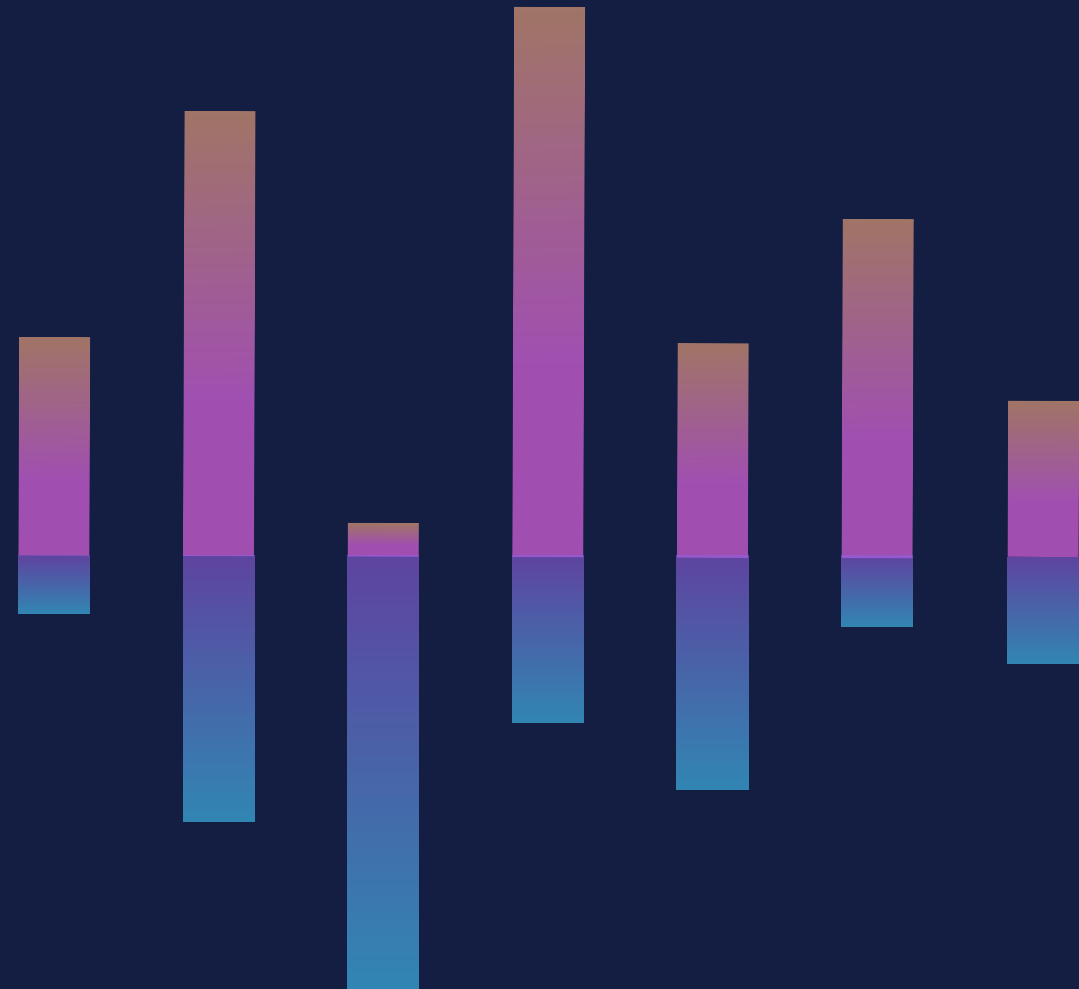*Not for public use or sharing*
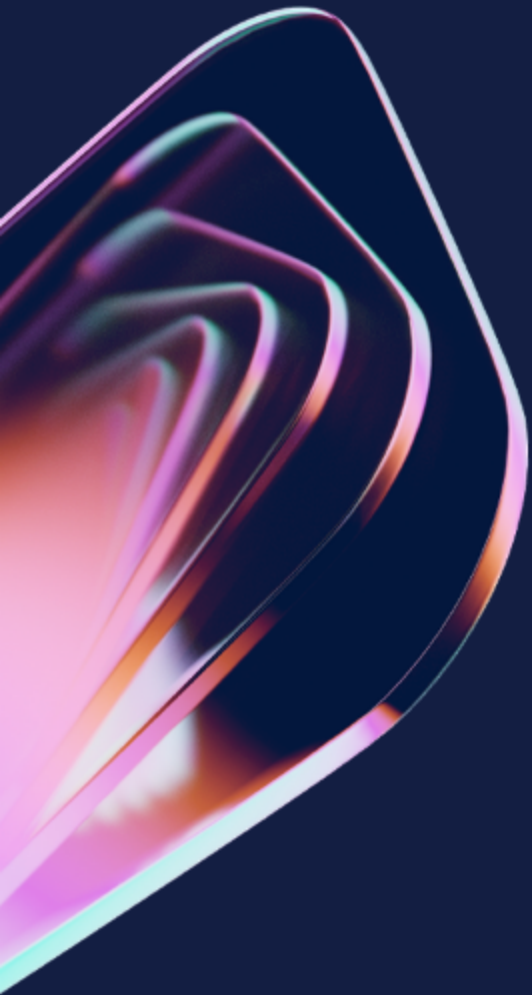
Introduction

Vision & alignment – FY25 priorities, AI/BusApp focus

Incentives – an update

To dos / recommendations

Q & A

# Introduction

For +20 years we have been working with Microsoft as:

- « enemy in crime »
- a partner
- supplier
- chief lead generator
- Etc.

A beloved child has many names BUT remember:

➢ **Our revenue:** a large share of our revenue in services, IP, etc. is linked to a Msft platform, solution, technology or service
➢ **Product, tools & services**: Msft is increasingly and rapidly expanding/changing their value proposition
➢ **Our leads/funding:** Msft delivers a good % …and soon channeled by AI?

As companies we have placed a large bet and committment with Msft.
A GOOD CHOICE!! It is therefore vital, for better and for worse to align

# Msft's own performance – FY24 Q4 (i.e. Apr. – June 2024)

**DYNAMICSPACT**
Global Microsoft Dynamics 365

## Msft has recently been punished in markets for lower Cloud/Azure growth than forecast

| Investor Metrics | FY23 Q4 | FY24 Q1 | FY24 Q2 | FY24 Q3 | FY24 Q4 |
|---|---|---|---|---|---|
| Commercial bookings growth (y/y) | (2)% / (1)% | 14% / 17% | 17% / 9% | 29% / 31% | 17% / 19% |
| Commercial remaining performance obligation (in billions) | $224 | $212 | $222 | $235 | $269 |
| Commercial revenue annuity mix | 97% | 96% | 96% | 97% | 97% |
| Microsoft Cloud revenue (in billions) | $30.3 | $31.8 | $33.7 | $35.1 | $36.8 |
| Microsoft Cloud revenue growth (y/y) | 21% / 23% | 24% / 23% | 24% / 22% | 23% | 21% / 22% |
| Microsoft Cloud gross margin percentage | 72% | 73% | 72% | 72% | 69% |

*Growth rates include non-GAAP CC growth (GAAP % / CC %).*

| Investor Metrics | FY23 Q4 | FY24 Q1 | FY24 Q2 | FY24 Q3 | FY24 Q4 |
|---|---|---|---|---|---|
| Office Commercial products and cloud services revenue growth (y/y) | 12% / 14% | 15% / 14% | 15% / 13% | 13% / 12% | 12% / 13% |
| Office Consumer products and cloud services revenue growth (y/y) | 3% / 6% | 3% / 4% | 5% / 4% | 4% | 3% / 4% |
| Office 365 Commercial seat growth (y/y) | 11% | 10% | 9% | 8% | 7% |
| Microsoft 365 Consumer subscribers (in millions) | 74.9 | 76.7 | 78.4 | 80.8 | 82.5 |
| Dynamics products and cloud services revenue growth (y/y) | 19% / 21% | 22% / 21% | 21% / 19% | 19% / 17% | 16% |
| LinkedIn revenue growth (y/y) | 6% / 8% | 8% | 9% / 8% | 10% / 9% | 10% / 9% |

*\*next earnings report is around 22/10/24*

# Some trends worth noting – detailed in following slides

Some certain…others probable but no guarantees

○ LSPs are not the favoured partners right now – Msft expected to take back EAs…risks for us…

○ GPS – the Msft teams are currently (still..) local….can go the same way as the marketing teams so beware

› Having a visible presence: in programs, filling the boxes, aligning to the « big bets », recognition

› Inboud and outbound, Sales relations

○ Incentives are once again changing (1/7, 1/8 and 1/10) …read the MCI Incentive Guide but key trends are:

› BAPA are aligning to specific MCEM stages and Solution Plays – **BUT limited nb. of engagements / year**

› For F&SCM EAs **a single fixed rate for SMC/ENT @250$/user**

› New and specialized engagements for:

· Low Code Vision & Value and Low Code Proof of Value engagements

· adding Copilot Studio, Finance & Supply Chain into the strategic accelerator

· phasing out the Sales Enterprise Accelerator

› Msft is focusing more and more (too much?) on delivery tools and success (see next slides)

02

# Vision & Alignment

FY25 priorities, AI/BusApp focus
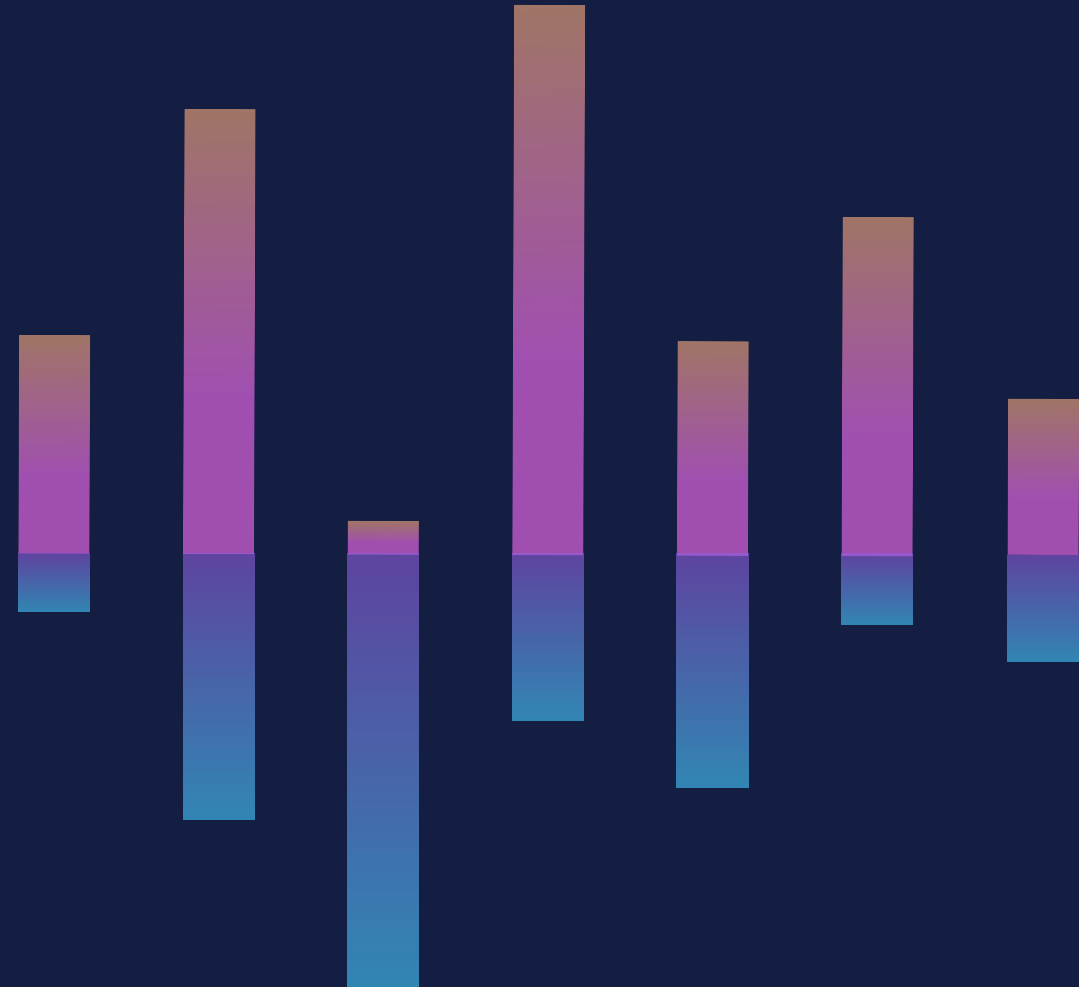
# Microsoft BIG FY25 priorities

Across all platforms and business lines (Azure consumption remains key!)

**Copilot empowerment**

**AI design wins**

**Cybersecurity foundation**

# Microsoft BIG FY25 priorities – from MCAPS* kickoff in July

Giving some more details

Copilots on every device across every role

AI design wins with every customer

Securing the cyber foundation of every customer

M365 core execution

Migrations, migrations, migrations

*Microsoft Customer and Partner Solutions*

# Microsoft AI/Copilot vision – Copilots to Agents

2024 is a VERY aggressive timing…

## The evolution of Copilots

| 2023 | 2024 |
| --- | --- |
| Search | Customization |
| Summarization | Collaboration |
| Generation | Automation |

## What does all this mean?

| 2023 | 2024 |
| --- | --- |
| **Moving from** | **To** |
| Teams of people working together to execute predefined workflows and processes | Teams of copilots and people working together to execute dynamic workflows and processes |

And next… AGENTS!!

# Microsoft AI vision – some insights on Agents

Agents – similar to Copilots…..but also VERY different

| | | |
|---|---|---|
| Agents can operate independently of the user to fully automate tasks | Agents can respond to events and Copilot requests, in addition to human requests | Agents can act on behalf of a company, department, or team – not just a user |

Remember…an agent will make data quality, access and security even more important

# Microsoft AI vision – Copilots to Agents….

Autonomous BusApps – but when?

# Microsoft vision – AI and BusApps of the future

How Microsoft is « segmenting » the market and GTM

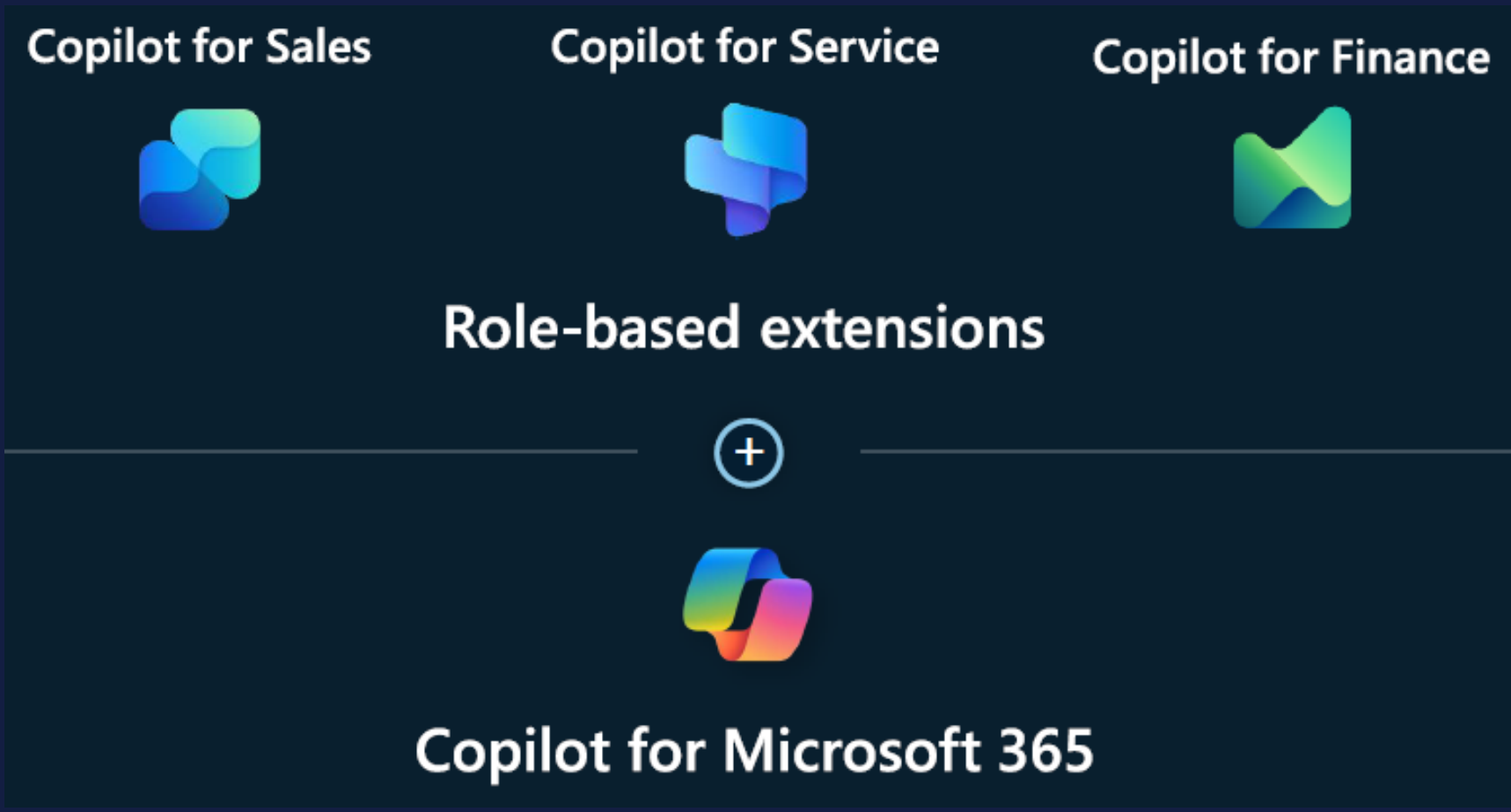Copilot for your
**CUSTOMERS**

Copilot for your
**BUSINESS**

Copilot
**AUTOMATION**
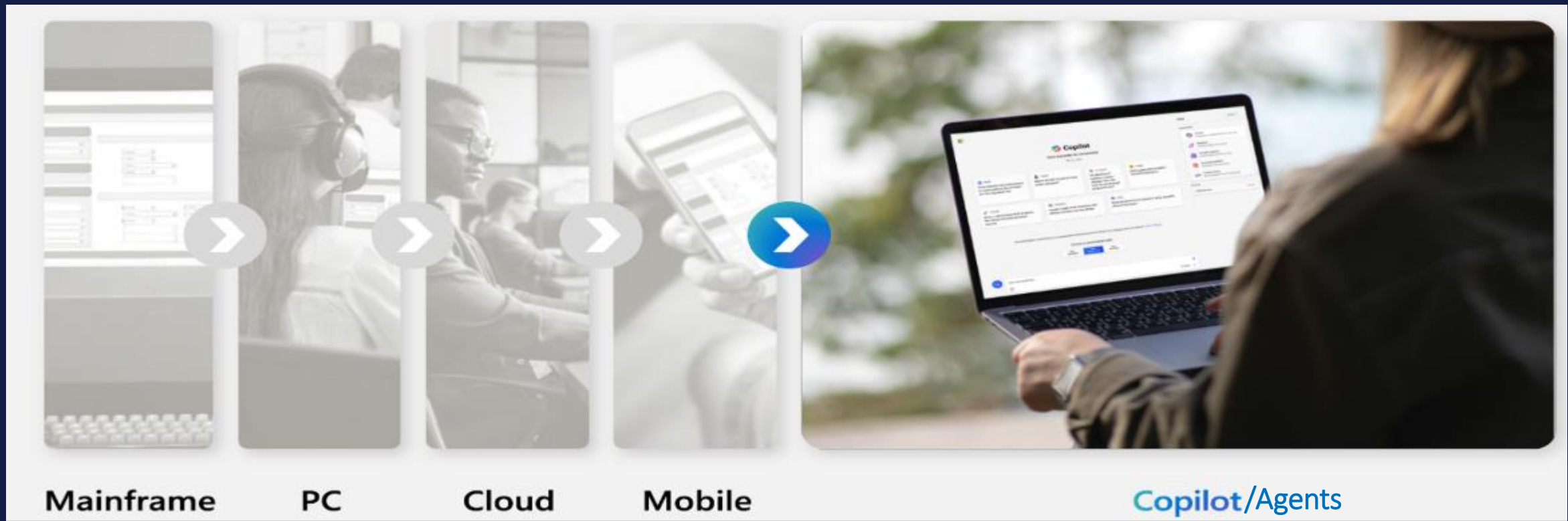
# Microsoft vision – which Copilot apps are key?

These are the Apps where Msft wants us to generatre leads and revenue

# Microsoft BusApps vision – ERP & CRM are back (for the moment)

How data goes in/out of applications will completely change….and will impact all processes



Mainframe    PC    Cloud    Mobile    Copilot/Agents

**BUT….Who cares or will know in which application things happen? We will simply access data, insights or launch actions. BusApps will be gone as a concept within 3yrs! And probably even ERP and CRM. What will replace?? Focus on business processes…Autonomous Business Processes (and in the cloud)!!**

# Microsoft BIG FY25 priorities – BusApps (not just Copilot/AI!)

Business
Copilots
Copilot Studio

Competitive
Sales Takeouts

SAP+Power App
Modernization
Hyper-
automation

ERP Migrations
Scale Business
Central

Meaning what:

○ For Copilot key focus is on **Copilot for Finance, Sales & Services** and of course Copilot Studio

○ For « Compete » it is replacing or surrounding mainly SalesForce and SAP (using Copilot as a differentiator)

# Microsoft BusApp FY25 priorities – Key solution Plays

As you can see Industry is almost completely missing!

| # | FY24 Solution Play | YoY Δ | # | FY25 Solution Play | FY25 Growth Drivers |
|---|---|---|---|---|---|
| 1 | Accelerate Innovation with Low Code | | 1 | Innovate with AI in Low Code | Power Apps<br>Power Automate<br>Copilot Studio |
| 2 | Accelerate Revenue Generation | | 2 | Accelerate Revenue Generation | D365 Sales |
| 3 | Modernize Service | | 3 | Modernize Service | D365 Customer Service<br>D365 Field Service<br>D365 Contact Center |
| 4 | Optimize Finance & Supply Chain | | 4 | Modernize ERP | D365 Finance<br>D365 Supply Chain Management |
| 5 | Scale Business Operations | | 5 | Scale Business Operations | D365 Business Central |
| | | | 6 | AI Powered Business with Copilot | Copilot for Sales<br>Copilot for Service<br>Copilot for Finance |

*(Left side vertical label: Business Applications)*

03

# Incentives / MCI*

Some insights
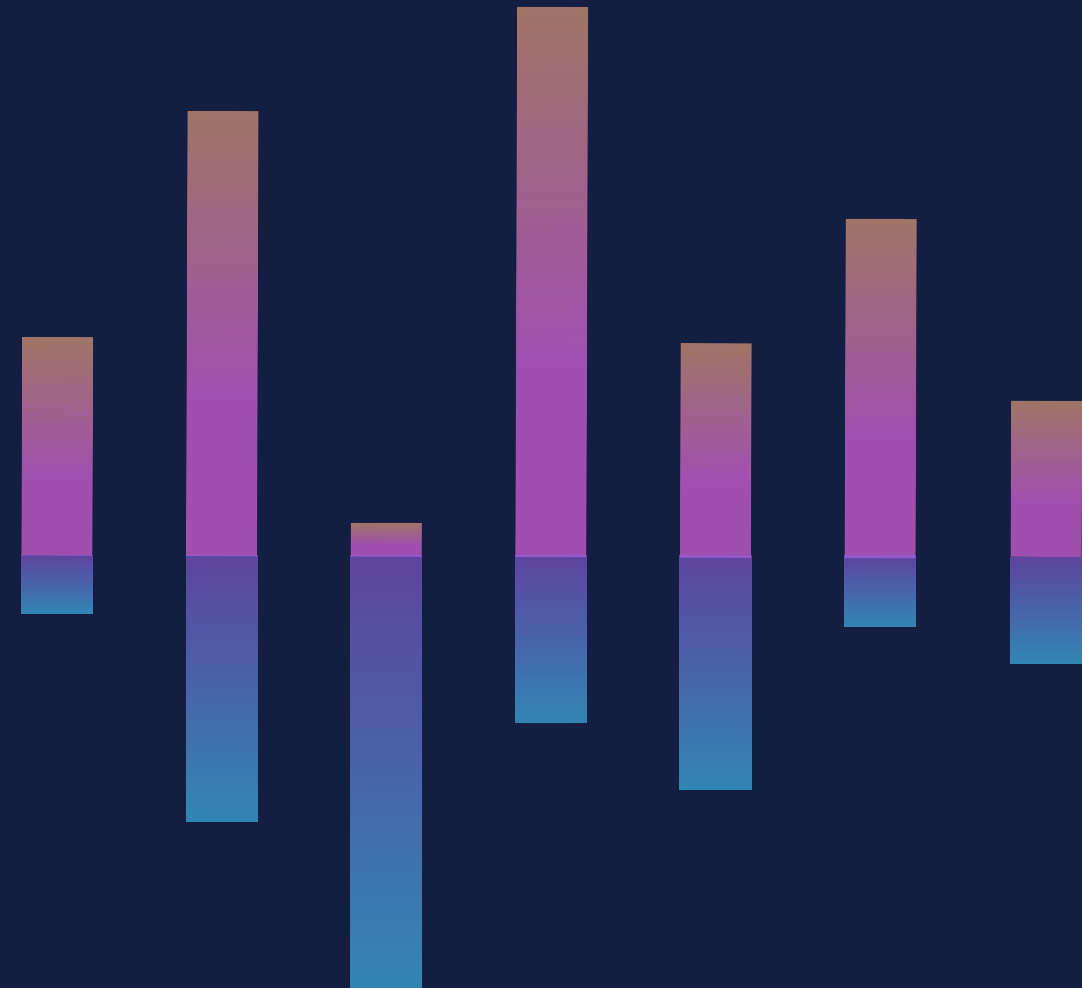
*Microsoft Commercial Incentives

# MCI update – MCEM & FY25 Solution Play alignment

Alignment of FY25 Partner Activities to Solution Plays and MCEM stages (new as of Oct. 1st)

Microsoft Customer Engagement Methodology (MCEM) by stages

| FY25 Solution Plays | Workloads | 1. Listen and Consult | 2. Inspire and Design | 3. Empower and Achieve | 4. Realize Value | 5. Manage and Optimize |
|---|---|---|---|---|---|---|
| Modernize ERP | Dynamics 365 Finance and Supply Chain | | ERP Vision and Value<br><br>◄──── ERP Tailored Demo ────► | | Dynamics 365 Vision and Value Optimization<br><br>Dynamics 365 Performance Optimization | Dynamics 365 Solution Optimization |
| Accelerate Revenue Generation | Dynamics 365 Sales and Customer Insights | | CRM Vision and Value | | | |
| Modernize Service | Dynamics 365 Customer Service, Field Service, and Contact Center | | ◄──── CRM Tailored Demo ────► | | | |
| Innovate with AI in Low Code | Power Apps Power Automate Copilot Studio | | Low Code Vision and Value<br><br>Low Code Needs Assessment<br><br>◄──── Low Code Governance Strategy ────► | | Low Code Deployment Accelerator | |
| Scale Business Operations | Dynamics 365 Business Central | | Business Central Needs Assessment | Business Central Migration Assessment | Business Central Deployment Accelerator | |
| **Modern Work** — AI Powered Business with Copilot | Role-based Copilots (ex. Copilot for Sales) | | Copilot Studio Value Discovery*<br><br>Copilot Value Discovery (Role based)* | | Copilot Evaluation Accelerator (Role based)* | |

**\*Copilot activities are part of Modern Work and must be claimed as Modern Work in MCI**

# MCI update Oct. 1st - changes to June/July FY25 announcements

Alignment of Partner Activities to Solution Plays and MCEM stages

03

## New engagement

**Low Code Governance Strategy**
- Pre-sales engagement for qualified Power Platform customer leads at stage 2 or 3 of MCEM.
- The objective of the activity is to establish a defined governance, operations, and community strategy for a successful platform adoption at scale.

## Customer eligibility

**Needs Assessment (Business Central, Low Code)**
- Customer eligibility expanded to include SMB and SMC customers

### Updated download kits

**ERP Vision & Value**
- Updated modules and simplified POE template

**CRM Vision & Value**
- Updated delivery guide

**Low Code Vision & Value**
- Enhanced OKR activities and content refresh

**Low Code Deployment Accelerator**
- Refreshed content

## Engagement name changes

| | Former name | *NEW* name |
|---|---|---|
| **Pre-Sales** | Tailored Demo: ERP Vision & Value | **ERP Tailored Demo** |
| | Tailored Demo: Customer Engagement Vision & Value | **CRM Tailored Demo** |
| | AIM Assessment | **Business Central Migration Assessment** |
| | Needs Assessment: Dynamics 365 Business Central | **Business Central Needs Assessment** |
| | Needs Assessment: Power Platform | **Low Code Needs Assessment** |
| **Post-Sales** | Low Code Solution Deployment | **Low Code Deployment Accelerator** |
| | Dynamics 365 Business Central Deployment Plan (XS, S, M) | **Business Central Deployment Accelerator (XS, S, M)** |
| | Dynamics 365 FastTrack Deployment | **D365 Performance Optimization** |
| | Dynamics 365 Solution Deployment | **D365 Solution Optimization** |
| | Dynamics 365 Vision and Deployment | **D365 Vision & Value Optimization** |

# MCI update Oct. 1st - changes to June/July FY25 announcements

Biz Apps Presales Advisor incentives (prev. OSA)

## ENGAGEMENT SUMMARY

Rewards and recognizes partners for pre-sales activities that drive the platform sale of Dynamics 365.

## ENGAGEMENT TERM

October 1, 2024 – September 30, 2025

### Eligibility

**Partner Agreement**
Microsoft AI Cloud Partner Program Agreement

**Incentive Enrollment**
Microsoft Commerce Incentives eligibility and enrollment requirements are checked on the last day of each month.

**Solutions Partner Designation**
Business Applications

**Licensing Agreement**
Enterprise Agreement, Microsoft Customer Agreement for Enterprise (MCA-E).

**Partner Association**
CPOR (Claiming Partner of Record). Partners must associate in Partner Center with the customers and the applicable subscriptions within 120 days of the transactional date. Claims after October 1, 2024, are subject to FY25 engagement rates and rules.

**Valid and complete identification,** tax and banking information submitted and accepted by Microsoft.

### Measure and Reward

Rewards partners on net paid seat growth above the High-Water Mark (HWM) at the tenant and workload level.

| Workloads | Segments* | |
|---|---|---|
| | Enterprise | SMC** |
| D365 Finance & Supply Chain | $250 | $250 |
| D365 Sales & Service | $20 | $80 |
| D365 Activity & Device | $75 | $175 |
| Basic Commerce Scale Units (CSU)- 65 Bundle | $4,875 | $11,375 |
| Standard Commerce Scale Units (CSU)- 225 Bundle | $16,875 | $39,375 |
| Premium Commerce Scale Units (CSU)- 500 Bundle | $37,500 | $87,500 |

*Customer segments as defined by Microsoft
**Small Medium & Corporate (SMC)

# MCI – Microsoft Commercial Incentives update

Constantly moving…all following slides are relevant as of 1/10/2024

In FY25 Msft updated the partner incentives portfolio to align to the big bets (Copilots on every device across every role, AI design wins with every customer, securing the cyber foundation of every customer, Microsoft 365 core execution, and migrations) and Solution Plays

Please see in the following slides details of the incentive updates by Cloud Solution area:

- Azure
- Modern Work
- Security
- **Business Applications (our focus today)**

For more information about the incentives outlined in these slides look here: preview policy guide

Specifically the FY25 partner incentives portfolio is here: Microsoft partner website

See here: MCI webinars and on-demand training content

# MCI – Microsoft Commercial Incentives update FOCUS AZURE

Constantly moving…relevant as of 1/10/2024

- **Azure Migrate and Modernize (AMM)** and **Azure Innovate:** Msft intends to heavily in AMM and Azure Innovate offerings to accelerate deal velocity and address diverse customer needs across the cloud adoption journey. Changes:
  - › expanded project size offerings
  - › eligible scenarios (partners and customers)
- **Azure Cloud Solution Provider (CSP):** Msft will to focus on customer adds for SMB and SMC via:
  - › a new Azure customer add accelerator
  - › expanding the existing workload accelerator to include security solutions.
- **Hosting Incentives** continues as an engagement in MCI with no change in the incentive rates or structure

  NB!! The Azure CSP incentives can be earned together with AMM and Azure Innovate to provide additional consumption earnings for applicable Azure projects.

  Msft has also have expanded the Azure accelerators (Workload & AI) to drive customer adoption

# MCI – Microsoft Commercial Incentives update FOCUS MODERN WORK

Constantly moving...relevant as of 1/10/2024

○ **Modern Work Cloud Solution Provider (CSP) Incentives:** CSP is the Msft « breadth motion » and they continue « as is » on program eligibility, rates, and strategic product accelerators. The focus is on Small, Medium and Corporate (SMC) customer segments with offers like Business Premium, Microsoft 365 E3, Microsoft 365 E5, and Copilot. **The CSP maximum incentive earning opportunity for select Modern Work and Security products has increased to align with this SMC strategy**.

○ **Modern Work Usage:** As part of the evolution of the Modern Work incentives strategy, **Modern Work workloads will no longer be eligible for the usage incentive. F**ocus is on funded engagement opportunities.

# MCI – Microsoft Commercial Incentives update FOCUS SECURITY

Constantly moving…relevant as of 1/10/2024

- **Data Security:** Msft introduces a new engagement designed to create customer intent for deploying and adopting Msft Purview solutions. Partners will earn a flat fee for engagement completion based on customer market. Note that this opportunity is available starting September 1, 2024.

- **Security Usage:** Security usage offering is continued in FY25, with focus on key strategic workloads such as Microsoft Entra ID P2, Microsoft Defender for Endpoint, and Microsoft Purview Information Protection. Partners will see earning opportunities with maximum earning caps by workload, rewarding growth above the High Water Mark (HWM).

- **Security Cloud Solutions Provider (CSP) Incentives:** Focus on Small, Medium and Corporate (SMC) customer segments in CSP and will adjust incentive rates to prioritize the strategic offers like Business Premium, Microsoft 365 E3, and Microsoft 365 E5, with incremental earning opportunities through strategic accelerators for security solutions.

# MCI – Microsoft Commercial Incentives update FOCUS BUSAPPS

Constantly moving….relevant as of 1/10/2024

○ **BizApps Pre-Sales & Post-Sale Activities:** simplified activity-based offerings updated already July 1, 2024. BAPA are better aligned to specific MCEM stages and Solution Plays. The activity-based incentives will continue to evolve throughout FY25.

○ **BizApps Presales Advisor (old OSA):** The BizApps OSA continues in FY25 and will have (effective Oct. 1st, 2024) :

› the same rate for F&SCM customers regardless of segment (so no longer Ent. SMB/SMC)

› for mainstream solution plays (CE & Activity/Device), rates remain differentiated by customer segment

○ **Power Platform to Low Code:** to drive usage of low-code tools Msft is expanding focus beyond Power Platform for FY25. Msft has more partner activities by introducing new and specialized engagements:

› Low Code Vision & Value

› Low Code Proof of Value engagements

○ **BizApps Cloud Solution Provider (CSP) Incentives:** Msft continue to:

› support BC and Copilot Sales/Service/Finance accelerators

› adding Copilot Studio, Finance & Supply Chain into the strategic accelerator lineup

› phasing out the Sales Enterprise Accelerator to align more closely with SMB strategy

# MCI – BAPA FY24 vs. FY25 Pre-sales activities (for EA or CSP)

BAPA evolution FY24 -> FY25

| FY24 Pre-sales Funded Engagements | | | FY25 Pre-sales Funded Engagements | | |
|---|---|---|---|---|---|
| **Listen and Consult** | **Inspire and Design** | **Empower and Achieve** | **Listen and Consult** | **Inspire and Design** | **Empower and Achieve** |
| | Envisioning Workshop | | | | |
| | Business Value Assessment | | | ERP Vision and Value | |
| | Solution Assessment | | | CRM  Vision and Value | |
| | Tailored demo | | | **ERP** Tailored Demo | |
| | | | | **CRM** Tailored Demo | |
| | Needs Assessment: Business Central | | | **Business Central** Needs Assessment | |
| | Needs Assessment: Sales | | | **Low Code** Needs Assessment | |
| | Needs Assessment: Power Platform | | | | |
| | AIM Assessment (fixed- and variable-fee for D365 and TSI) | | | | **Business Central** Migration Assessment |
| | Power Center of Excellence | | | Low Code Vision and Value | |
| | | | | **Low Code** Governance Strategy | |
| | | | | Copilot Studio Value Discovery* | |
| | | | | Copilot Value Discovery (Role based)* | |

Note: FY24 TSI engagements have been retired in FY25
*Copilot activities are part of Modern Work and must be claimed as Modern Work in MCI

# MCI – BAPA FY24 vs. FY25 Post-sales activities (for EA or CSP)

BAPA evolution FY24 -> FY25

**DYNAMICSPACT**
Global Microsoft Dynamics 365

| FY24 Post-sales Funded Engagements | | FY25 Post-sales Funded Engagements | |
| --- | --- | --- | --- |
| Realize Value | Manage and Optimize | Realize Value | Manage and Optimize |
| Envisioning and MVP<br>Success by Design Performance Plan<br>Success by Design Performance Check<br>Success Planning<br>Value Realization | Solution Optimization | **Dynamics 365** Vision & Value Optimization<br>**Dynamics 365** Performance Optimization | **Dynamics 365** Solution Optimization |
| Business Central Deployment Plan<br>AIM Deployment Plan | | **Business Central** Deployment Accelerator | |
| Envisioning and App<br>Power Center of Excellence<br>Pro Dev Success Enablement | | **Low Code** Deployment Accelerator<br>Copilot Evaluation Accelerator<br>**(Role-based)*** | |

Note: FY24 TSI engagements have been retired in FY25
*Copilot activities are part of Modern Work and must be claimed as Modern Work in MCI

## Maximum active engagements per customer

Partner IDs will be limited to a maximum of 4 active MCI Business Applications Partner Activities engagements per customer at one time. Active engagements are those where a customer has been claimed until the claim POE has been approved. If a customer has reached this threshold, one or more of the active claims will need to be canceled, approved, rejected, or expired to allow partner to create additional claims for that customer.

Geographical restrictions: The activity of a partner Global Account (VOrg) in any given country is subject to a maximum limitation of total active or completed claims for any given Business Applications Build Intent engagement. This total is aggregated across all claims made for a given engagement by any of the partner's locations (MPN IDs) within that country. This maximum limit is determined by the country's market definition:

| Engagement | Market A | Market B | Market C |
|---|---|---|---|
| **Pre-Sales:** Customer Engagement Vision & Value, ERP Vision & Value, Low Code Vision & Value, Tailored Demo: Customer Engagement Vision & Value , Tailored Demo: ERP Vision & Value<br>**Post-Sales:** Business Central Deployment Plan, Dynamics 365 Vision & Deployment, Dynamics 365 FastTrack Deployment, Dynamics 365 Solution Deployment, Low Code Solution Deployment | 20 | 10 | 10 |
| **Pre-Sales:** AIM Assessment, Dynamics 365 Business Central: Needs Assessment | 40 | 20 | 10 |
| **Pre-Sales:** Power Platform: Needs Assessment | 20 | 20 | 20 |

## Subcontracting

Partners may not subcontract any engagement(s) to any third party(ies). Microsoft will not pay incentives to any partners [and/or partner affiliates] for activities completed by third party(ies) (such third party(ies) including but not limited to subcontractors or vendors). All claimed engagement(s) must be executed directly by the claiming eligible partner in order to qualify for approval and payment.

Microsoft will conduct regular audits to monitor the number of active engagements per Partner ID. Microsoft may, in its sole discretion, terminate partners for falsely creating engagements to claim earnings, or for engaging in activities that do not align with the program intent.

## Repeat Engagements

Customers may not receive the same Variable payout engagement more than 1x per valid MSX Opportunity ID. Customers may not receive the same Fixed Fee engagement more than 1x per valid TPID or Tenant ID.

## Bona fide Customer Validation

Bona fide Customer Validation - Eligible customers must have a customer email address that is distinct from the partner's domain or tenant and is aligned to the Customer domain or tenant.

**Duration:** Approximately 3-4 weeks
**Customer Commitment:** ~30 to 40 hours of focused involvement
**Output:** A Tailored plan and design that aligns with customers business goals and Vision with D365 Finance and SCM
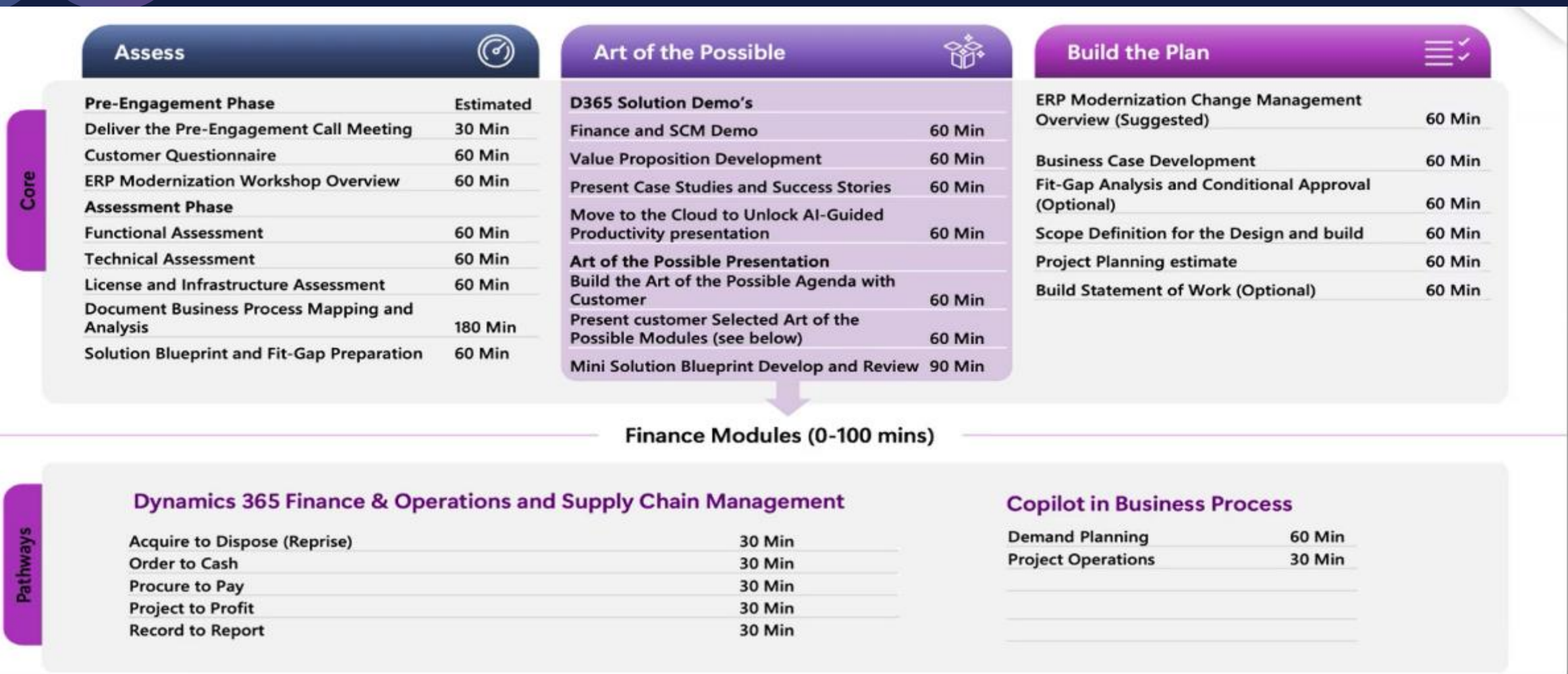
## Workshop Objectives

1. **Empower Customers to revamp their core processes** and become AI ready through standardized "Transformation and Migration Workshops" from on premises ERP's to D365 Finance & Supply Chain

2. **Repeatable implementation success** by aligning customer and partner on business outcomes and timeline

3. **Build customer confidence** that platform will support current and future business requirements; Provide Customers with Microsoft Best Practice POV

4. **Develop business case and SOW**

*We see a trend where partners are employing a "managed services" approach – delivering projects incrementally while empowering customers to realize value sooner. This workshop will lean into this methodology.*

## Approach

1. **Module 1: Assess**
   - <u>Goal</u>: Creation of a prescriptive solution business needs assessment for on-premises ERP migration
   - <u>Output</u>: Gap analysis, desired business outcomes and measures of success, solution priorities

2. **Module 2: Art of the possible**
   - <u>Goal</u>: Building customer confidence by driving vision for business process transformation and articulation of value for migrating from on-premises ERPs to Dynamics 365
   - <u>Output</u>: Understanding of prioritized scenarios and targeted business personas

3. **Module 3: Build the Plan**
   - <u>Goal</u>: Creation of a standard business value analysis and proposal
   - <u>Output</u>: Project plan and SOW, boardroom-ready business case

## Assess

| Core | | |
|---|---|---|
| **Pre-Engagement Phase** | **Estimated** | |
| Deliver the Pre-Engagement Call Meeting | 30 Min | |
| Customer Questionnaire | 60 Min | |
| ERP Modernization Workshop Overview | 60 Min | |
| **Assessment Phase** | | |
| Functional Assessment | 60 Min | |
| Technical Assessment | 60 Min | |
| License and Infrastructure Assessment | 60 Min | |
| Document Business Process Mapping and Analysis | 180 Min | |
| Solution Blueprint and Fit-Gap Preparation | 60 Min | |

## Art of the Possible

| | |
|---|---|
| **D365 Solution Demo's** | |
| Finance and SCM Demo | 60 Min |
| Value Proposition Development | 60 Min |
| Present Case Studies and Success Stories | 60 Min |
| Move to the Cloud to Unlock AI-Guided Productivity presentation | 60 Min |
| **Art of the Possible Presentation** | |
| Build the Art of the Possible Agenda with Customer | 60 Min |
| Present customer Selected Art of the Possible Modules (see below) | 60 Min |
| Mini Solution Blueprint Develop and Review | 90 Min |

## Build the Plan

| | |
|---|---|
| ERP Modernization Change Management Overview (Suggested) | 60 Min |
| Business Case Development | 60 Min |
| Fit-Gap Analysis and Conditional Approval (Optional) | 60 Min |
| Scope Definition for the Design and build | 60 Min |
| Project Planning estimate | 60 Min |
| Build Statement of Work (Optional) | 60 Min |

## Finance Modules (0-100 mins)

| Pathways | | |
|---|---|---|
| **Dynamics 365 Finance & Operations and Supply Chain Management** | | |
| Acquire to Dispose (Reprise) | 30 Min | |
| Order to Cash | 30 Min | |
| Procure to Pay | 30 Min | |
| Project to Profit | 30 Min | |
| Record to Report | 30 Min | |

| **Copilot in Business Process** | |
|---|---|
| Demand Planning | 60 Min |
| Project Operations | 30 Min |

# MCI – BAPA, focus on « ERP Vision & Value » and our POE obligations

Seriously? We must provide this as POE??? ROI? Functional Assessment?

# To dos / recommendations

For DynamicsPact
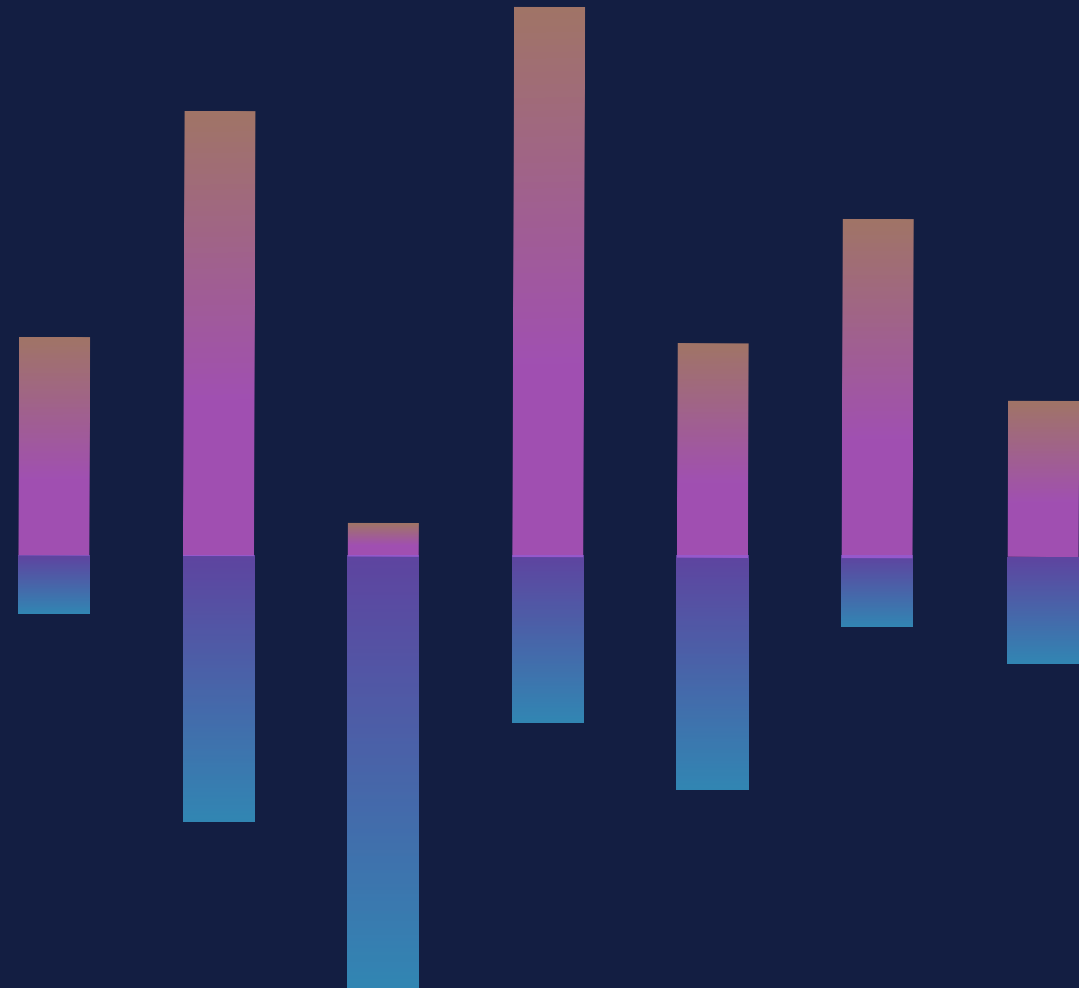
# Sales / partner / marketing to dos

1. Align to the „big bets" AND don't forget marketing is NOT just about the money... engagement means focus, visibility and credibility
2. Understand local Msft & what motivates your counterparties (scorecard, tools, focus)
3. Know your company Business Plan (PBP) with Msft and track the PINs
4. **Read the Licensing guide (for sales/presales) and the MCI guide**
5. Understand MCEM and align (see next slide)!!! Get certified!
6. **Get Solution Designations & Specializations (big impact on incentives, marketing & BREP)**
7. Know the MAL (and use it not only to MAP but to exchange)
8. Be transparent and rapid with lead sharing (moment of truth) so more „declarations" in MPC and don't forget to invest in „Msft Dublin"

CONNECT AND ALIGN – talk to them! They are only people and they need help!
And don't forget – cash is king ($$$ is in the end what is visible)!

# 04

1. Understand ASfP (or PSfP if you have it) and the CS teams and use them correctly
2. Understand Fast Track and Concierge (and similar services for MW and Azure) and use them correctly
3. LCS is dead! Analyse and use, when relevant, the Implementation Portal, Success by Design and all the tools built by the FastTrack team (process descriptions, etc.)
4. Unified UI, Admin and developer experience across all Dynamics is coming (at least the first two) – prepare for this
5. Get the Managed Services Solution Designation and focus here – Managed Services is a key revenue stream for the future

CONNECT AND ALIGN – use and talk to Msft also here. Ask for help!

No reason for us to reinvent multiple variants of certain tools, methodologies, etc. when Msft is investing. Pick, chose and enhance intelligently!!
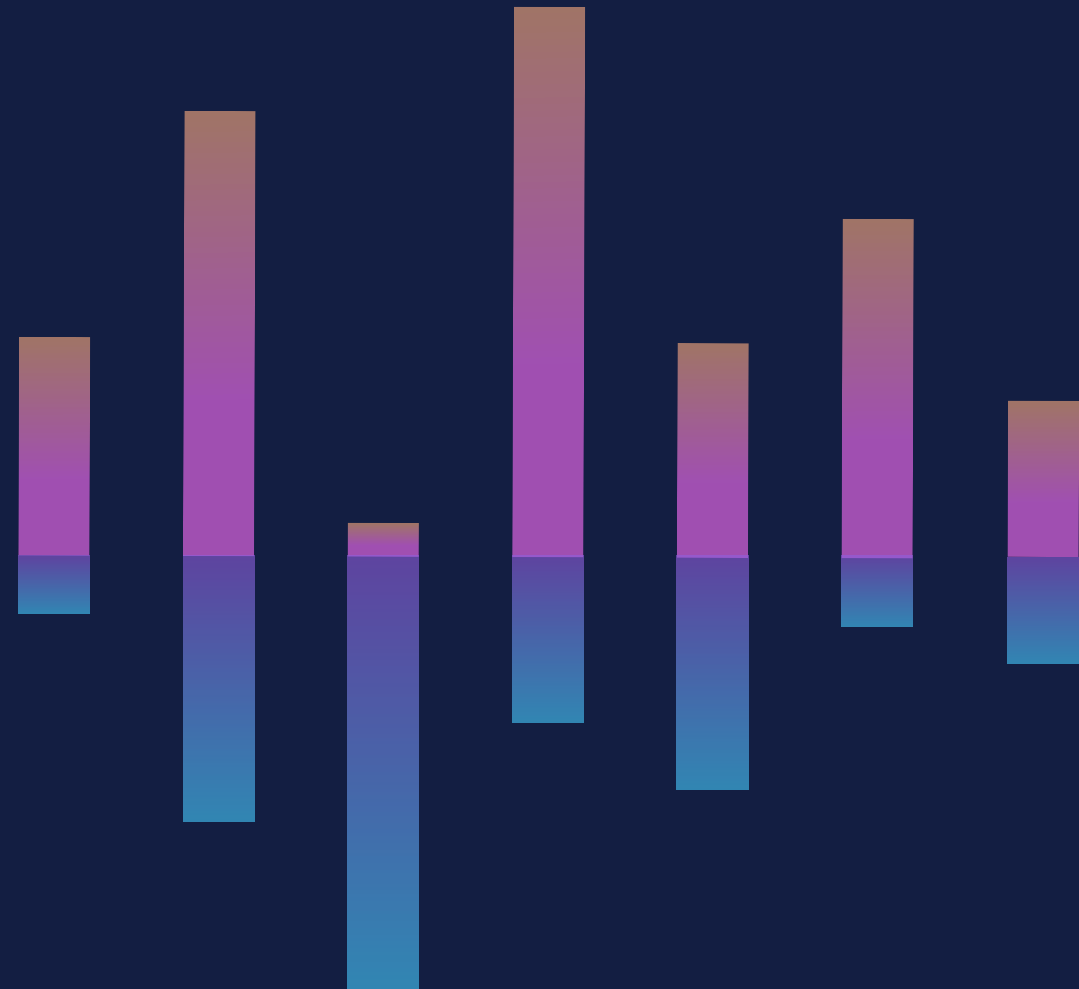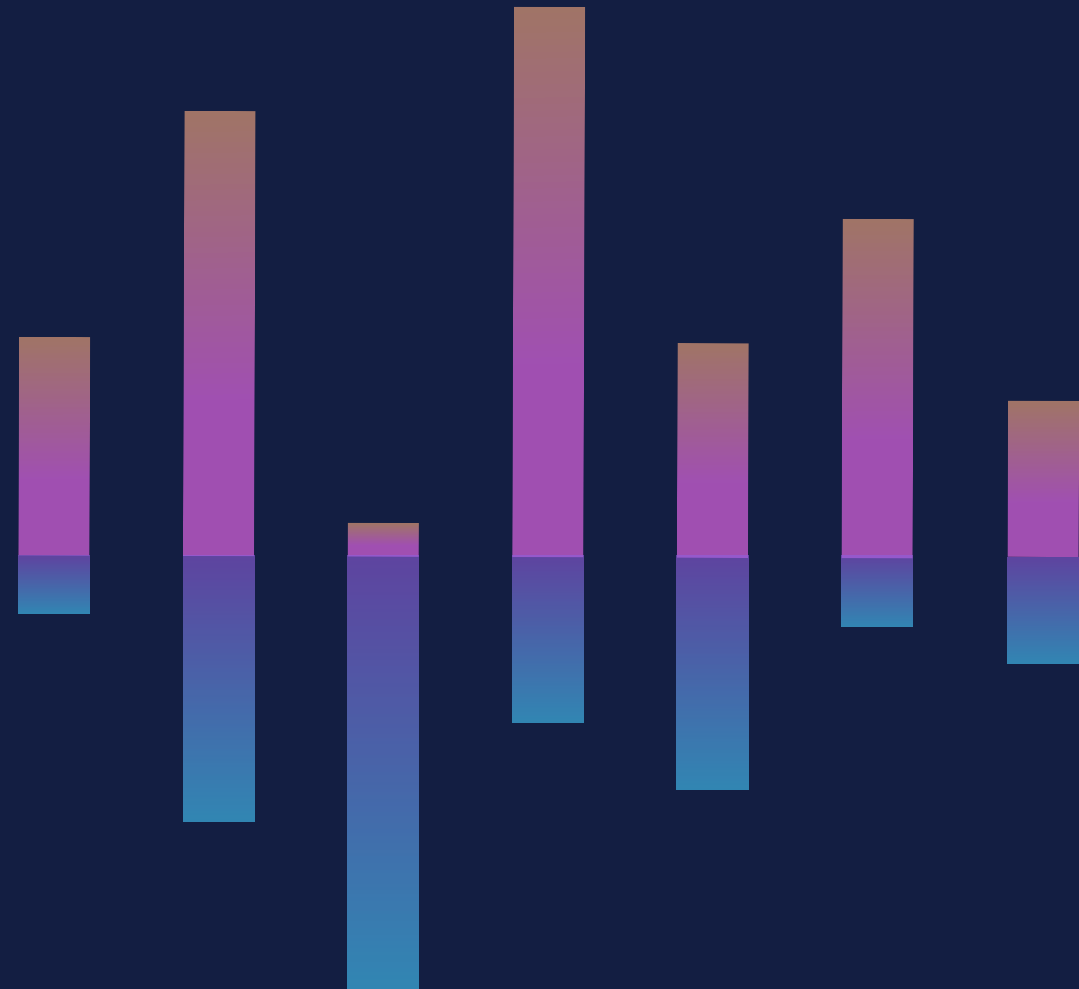
06

# Extra slides

# 06 Solution Designations & Specializations

Here are the specific specializations we can get with the BusApp Solution Designation

**Action** | Accelerate your practice to Business Application specialization to unlock investments

## Solutions Partner designations

### Deliver solutions with Dynamics 365 and Power Platform

**Stand out to customers**

- Differentiate with badging
- Access to exclusive tools, resources and benefits
- Increase capacity to drive AI designation wins

**Expand opportunities**

- Win business decision makers
- Transformation across new expansion of workloads
- Unlock opportunities to sell with Microsoft

## Specializations

### Accelerate time to value for customers with specializations

- Finance
- Intelligent Automation
- Low Code Application Development
- Sales
- Service
- Small and Midsize Business Management
- Supply Chain

**Get access to practice accelerating benefits and incentives**

- Business Application and other licenses
- Business Intelligence Engagement

→ Access to top investment motions and Co-sell through specializations

Additional Business Application and other licenses

* Current thresholds will become Enterprise thresholds. Thresholds for SMB path will be announced early in FY25.

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# Partner eligibility criteria for Copilot workshops, effective 1/8/24

Msft. Corp is finally clarifying and simplifying!

To qualify please start the process by submitting the eligibility request form: http://aka.ms/copilotaccelerateapply

**Partner eligibility changes for the following Modern Work MCI engagements:**
• Copilot Adoption Accelerator-XLarge
• Copilot Adoption Accelerator-Large
• Copilot Evaluation Accelerator-Medium
• Copilot Evaluation Accelerator-Small
• Copilot Evaluation Accelerator (Role Based)
• Copilot Value Discovery
• Copilot Value Discovery (Role Based)
• Copilot Studio Value Discovery

**Partner Eligibility Change Details (Effective** August 1, 2024):
• **Engagement Name:** All above engagements
    • What's changing: Partner eligibility requirement verbiage, elimination of the term "Jumpstart"
    • New eligibility terms:
        o Partners with a Modern Work or Business Applications specialization; and validated Copilot practice and offer.
        o Copilot Studio Value Discovery also requires the following: Eligibility above OR Low Code Application development Specialization OR Intelligent Automation Specialization
    • Effective change:
        oPartners currently in the Copilot Jumpstart initiative will remain eligible.
        oPartners who wish to establish eligibility for these Copilot engagements will need to follow the process found on the below form:
            ▪ Eligibility request form: http://aka.ms/copilotaccelerateapply