



## **Envision and Roadmap for Dynamics 365 Finance and Supply Chain Management**

Onboarding Services | 3 - 10 Days | Remote or Onsite | Level 300 - Advanced

### **Description**

The Envision and Roadmap service helps existing Dynamics 365 Finance, Supply chain management and/or Commerce customers develop a roadmap for delivering incremental business value in an accelerated timeframe. Obtain advice and guidance from technology experts to understand how you can leverage the Dynamics 365 platform to address challenges and drive business outcomes. Maximize the value of your existing investment in Dynamics 365 and learn how additional solutions can deliver even more benefits.

NOTE: This service is intended for customers who have successfully deployed Dynamics 365 and are ready for a “what is next” conversation. A scoping call is required to align the delivery with your needs.

### **Objectives**

- Review the implementation and adoption of your existing Dynamics 365 business solution.
- Understand your existing challenges and desired business outcomes.
- Provide tangible recommendations to achieve more value from Dynamics 365.

### **Outcomes**

- Insight into the challenges faced by stakeholders and end users, and their desired business outcomes.
- Understanding of how the Dynamics 365 platform and features can be leveraged to address existing challenges and drive desired business outcomes.
- A roadmap of prioritized recommendations and initiatives aligned to business outcomes.

## Methodology

**Discovery** - Understand your solution, goals, challenges, and user sentiment while reviewing licensed capabilities and usage.

**Co-creation Workshop** - Share discovery insights thru guided discussion and prioritization of potential initiatives.

**Recommendations** - Prepare and present a roadmap of prioritized recommendations and initiatives aligned to business outcomes.

### Customer Participants

- Business Decision Makers
- Technology leaders
- Strategic Leads
- Operational Leads
- End Users
- Dynamics 365 Product Owners
- Dynamics 365 Service Owners
- Engagement Sponsor

## Agenda

The agenda for your delivery will be finalized following a scoping call. This will include agreement of in-scope business areas and processes aligned to the available capacity, to ensure the delivery meets your requirements. A typical agenda is as follows:

### Day 1-4

- Kick-off
- Discovery interviews
- Review of licensed capabilities and usage

### Day 5-7

- Co-creation workshop preparation and delivery

### Day 8-10

- Final report preparation
- Presentation of recommendations

- Close out