



Microsoft Dynamics for Service Industries

Today's digital world is progressively changing the way that clients interact with professional services firms. Client expectations are shaped by day-to-day consumer experiences where immediate responses and on-demand self-service access to information is the norm. Now more than ever, building trusted relationships and maintaining a solid reputation depends on delivery of outstanding and increasingly distinctive experiences—not just for a single project or at executive levels, but consistently across every client interaction. Firms need to embrace new levels of transparency and build a workplace where it's easy for professionals to find and share information about clients, access all available expertise and apply preferred practices widely.

With foresight and integrated, flexible systems, firm leadership can optimize people and processes, streamline operations, deliver distinctive client experiences, and fulfill profitable growth objectives. By taking advantage of these integrated business solutions that work across multiple business focus areas and individual roles, professional services organizations can obtain a 360-degree view into client relationships and better coordinate project execution.

Microsoft helps firms achieve these benefits through solutions that work together, empowering employees to deliver the very best a firm has to offer at every client touch point. They help improve efficiency, make it easy to find and share information and insights, provide transparency into and across the business, and enable firms to react quickly to take advantage of new opportunities.

"By using Microsoft Dynamics AX, we've tightened our revenue-to-cash cycle while providing more detailed, timely, and actionable operating information to our leadership team."
 --Andy McIntyre, CFO, Computer Aid Inc.

Client-Centric	Talent-Driven	Action-Oriented
<p>Cultivate firm reputation through client-specific experiences delivered across distributed teams.</p>	<p>Balance staff utilization across boundaries while catalyzing professional creativity and innovation.</p>	<p>Accelerate project execution and firm operations with familiar, flexible, role-based tools and timely insights.</p>
<p>A firm's brand or reputation is the aggregate result of client perceptions shaped through interactions with professionals, project experiences, use of digital assets, exposure to marketing materials and word-of-mouth.</p> <p>Provide relevant, proactive offerings that delight clients. With integrated systems that deliver the right insights to all types and levels of employees OR the right insights to the right people in the organization at the right time, professional services firms can respond more dynamically to changing client demands and market conditions.</p> <p>Deliver globally with a personalized touch. Cultivate specific service experiences that appeal to target clients and grow the firm's reputation in the marketplace.</p> <p>Differentiate your business. Your reputation and revenue depend on delivery of consistent yet distinctive experiences at each stage in the dynamic client relationship. Integrated business solutions further strategic objectives through improved process maturity and drive impactful performance results.</p> <p>Follow the right clients. Know which clients are drivers of profitable growth. Define account profiles and market segments that the firm recognizes as worthy of pursuing and capturing. Use CRM capabilities to manage and track these opportunities and client relationships.</p>	<p>More effective utilization of available expertise and higher productivity through collaboration and best practice can increase revenue per employee and firm profitability.</p> <p>Staff for success. Next level performance begins with end-to-end human capital management. Recruit-to-hire workflows and automation help capture and onboard the best and brightest candidates. Analytics highlight top performers and built-in career management and competency tracking guide ongoing professional development.</p> <p>Operate globally. Take advantage of advanced scheduling capabilities that enable identification and assignment of the most qualified and available resources to client projects across offices, practice groups and globally distributed firm operations. Balance and optimize resource utilization to simultaneously improve delivery of client value and drive firm profitability.</p> <p>Execute as a team. Maintain continuity in projects and relationships by easily accessing data and sharing knowledge through client- and project-centric portals as well as business-focused social applications. Achieve true cross-border collaboration and enable delivery of increasingly targeted client experiences that differentiate your firm.</p>	<p>In an increasingly competitive world client organizations are running faster than ever to serve their customers. Service providers need to operate at the speed of their clients, and their professionals need the right information and tools at their fingertips to deliver instant status updates, make better decisions faster, and execute without delay.</p> <p>Respond swiftly. Meet and exceed client expectations for timely and accurate answers with 360 views of client relationships and immediate drill-down into project status, team composition and granular transactions.</p> <p>Improve productivity. Take advantage of project templates and role-specific user interfaces that deliver contextual insights for consultants, engineers, project managers, practice managers and other team members. Take advantage of native Microsoft Project and Excel integration to work smarter in familiar tools that connect with business processes and transactional activities.</p> <p>Adapt with agility. Expand into new markets and establish an integrated business presence in new geographies, applying proven business practices and processes with consistency. Easily adapt processes to address local market realities and changing client demands, developing next practices that become proven best practices.</p>

At-a-Glance Chart of Features and Benefits of Microsoft Dynamics

Familiar User Experience	<ul style="list-style-type: none"> Accelerate adoption with a familiar, integrated platform of tools that help professionals to do their jobs more effectively. Enhance productivity and business insight through configurable user interfaces tailored by role and practice group.
Client Relationship Management	<ul style="list-style-type: none"> Apply a client-centric approach. Access social insights and connections that make every client conversation more relevant, valuable and productive. Collaborate on pursuits, refine proposals, and win deals. Deepen client relationships with real time insights from InsideView (US), included with CRM OL license. Follow a guided pursuit process with built-in team coordination, collaboration and risk management. Standardize on best or preferred practices for consistent outcomes, then rapidly develop next practices. Keep teams connected with new tablet and phone apps. Professionals can always access key data and update information in real-time. Cached data allows for offline viewing even if connectivity is lost.
Human Capital Management	<ul style="list-style-type: none"> Coordinate the recruitment process more efficiently including campaigns, screenings and candidate correspondence. Retain and develop talent using core HRMS and talent management features, and analyze skill sets with the right metrics. Manage hires, terminations, transfers, promotions, and leaves using employee based personnel actions and workflow. Monitor and administer benefits, absences, compensation, illness tracking, competencies and more.
Project Management and Accounting	<ul style="list-style-type: none"> Manage projects proactively to maintain service quality and ensure practice profitability. Synchronize project information into Microsoft Office 365 and Microsoft Project Server for collaboration and sharing. Visually and easily track progress using a variety of metrics by using the Project Manager role center in Dynamics AX. Easily add and manage critical KPIs for operational and financial management using The Role Center framework. WBS, or work breakdown structure templates can be used and modified to suit specific project needs.
Project Time and Expense	<ul style="list-style-type: none"> Submit time, expense, and approvals from various mobile devices and from web-based applications. Guide employee submissions and manager approvals with configurable business process flows and rules. Reconcile expenses while traveling; streamline employee reimbursement, implement expense policies seamlessly.
Service Management	<ul style="list-style-type: none"> Streamline service operations with service agreements, service orders, service subscriptions and repair management. Use service agreements to define the resources, service level agreement and view how they are invoiced.
Business Insight and Reporting	<ul style="list-style-type: none"> Use Business Analyzer (a free companion app) to deliver business insights to practice managers anywhere and anytime. Easily add new KPIs that are important to managing operational and financial responsibilities within the business. Identify the right business opportunities right away. Use rich financial and operational insights with the flexibility of unlimited financial dimensions, pre-defined KPIs and charts to listen to clients and track competitors globally. Visualize trusted data and allow sharing and collaboration of business insights in a familiar SharePoint Server environment.
Financials, Compliance, and Internal Controls	<ul style="list-style-type: none"> Manage and transact across legal entities and regulatory contexts. Borrow and loan resources between companies and generate intercompany invoices for various transaction types including labor, expense and vendor invoices. Take advantage of unlimited financial dimensions and expanded reporting capabilities. Flexible, diverse billing engine facilitates collaboration with clients and reduces billing process management time. Create a budget plan worksheet template for Microsoft Excel by using a wizard in Microsoft Dynamics AX.
Procurement and Sourcing	<ul style="list-style-type: none"> Enforce spending policies, enable approval processes, and facilitate employee self-service for performance goal management using the Employee Portal and workflow tools. Track purchases with vendors, follow pricing agreements and honor negotiated payment terms. Help vendors operate more efficiently by providing the ability to view and respond to open RFXs, provide visibility into the status and results of a solicitation, update catalog content, submit invoices, review payments and much more.
Tools	<ul style="list-style-type: none"> Automate business processes through a graphical workflow editor to create business rules and custom workflows (or use templates) by business analysts. Make organization-specific modifications easily in Microsoft Visual Studio and X++ development environments. Ease application-to-application and business-to-business integration with an application integration framework. Work across devices, from almost any location. Provide a consistent experience across your PC, phone, and tablet.
Employee Portal	<ul style="list-style-type: none"> Use the Employee Portal and workflow tools to enforce spending limits, allow approval policies and enable employee self-service for time reporting, project and travel related expenses, and performance goal management.
Companion Applications	<ul style="list-style-type: none"> Provide native app experiences on multiple mobile phone platforms as well as Microsoft Windows 8 tablet devices. Simplify the burden of capturing time spent on projects "on the go", improving working capital and billing cycle times. Enable managers to approve business requests such as budgets, time sheets, expense reports and purchase requisitions.
Platform	<ul style="list-style-type: none"> Simplify and standardize the implementation process, and improve predictability and quality. Collaborate easily with implementation business experts using a Windows Azure-based workspace. Take advantage of expanded services that are supported: Business Process Modeler, Usage Profiler, License Sizing Estimator, Customization Analysis, System Diagnostic, Upgrade Analysis, and Issue Search. Utilize IaaS with Microsoft Dynamics AX 2012 R3 to run on Azure for easy deployment in the cloud. Connect devices from outside the organization's firewall using the Windows Azure Service Bus. Quickly deploy a production environment in a matter of hours instead of weeks.