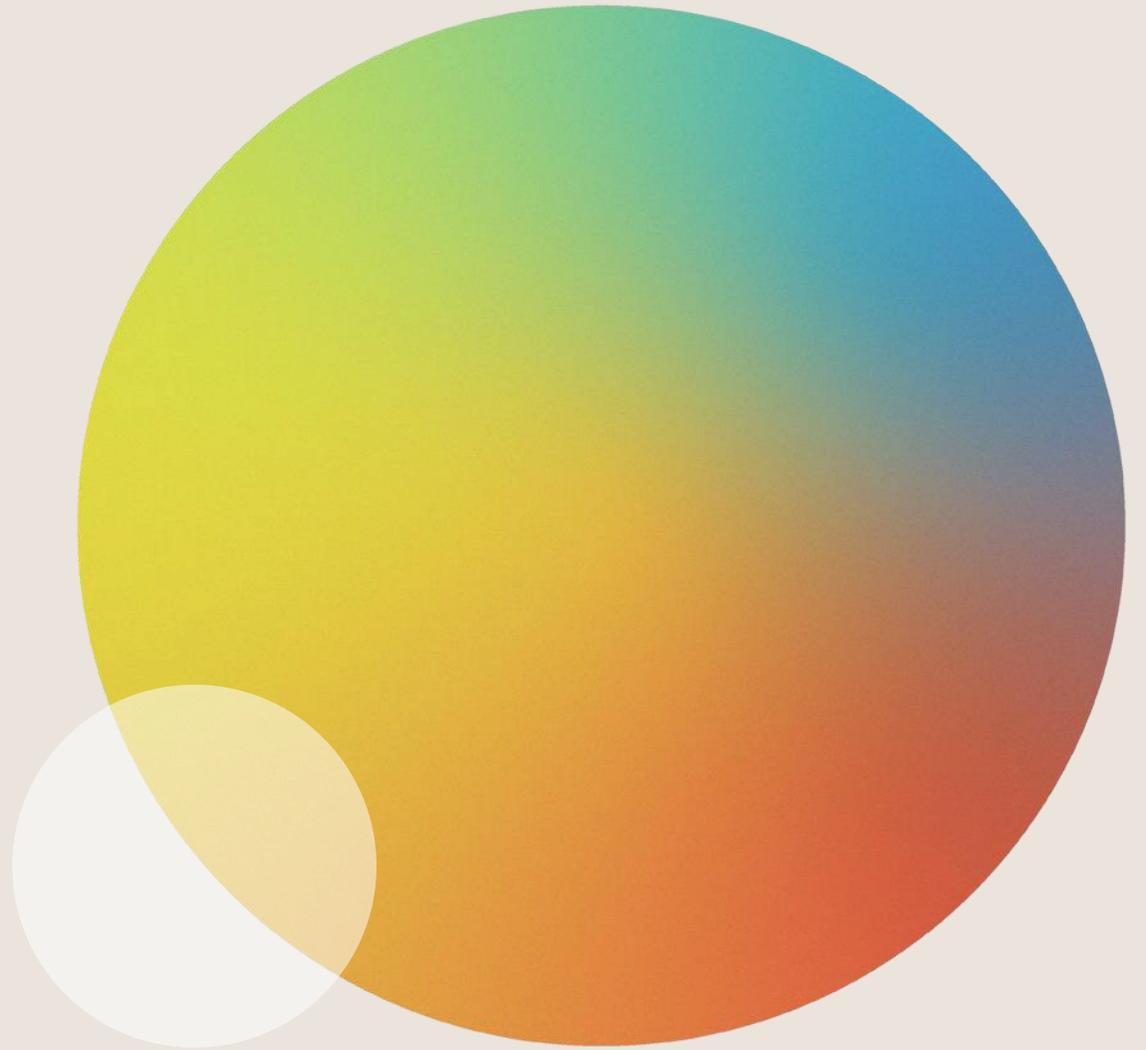


# Community Call: ERP Edition

JULY 2024



# TODAY'S TOPICS

- 1 Why ERP Vision and Value Workshop?
- 2 How the Workshop Sets You Up for Success
- 3 Action: Bring the Workshop to Your Customers and Share Your feedback



Ragnar Pitla

ERP Vision & Value Lead

# What is ERP Vision and Value Workshop and Why?

# Market Opportunity: Modernize ERP

Boost your customers business performance and quickly adapt to change with an agile and intelligent ERP

## Why Now

- Several on-prem ERP systems (SAP, Oracle) will go **out of maintenance in the next two years**, forcing a move to the cloud
- **Rapid AI technology changes** and need for real time decision making are accelerating autonomous ERP product capabilities
- ERP is the second-largest category in IT spend, with **60% of existing systems being over five years old**, leading to inefficiencies and increased operational risks

## How We're Positioned

- **Leader in Gartner's Magic Quadrant for Cloud ERP** for Product-Centric Enterprises and IDC MarketScapes
- Microsoft is **significantly ahead with Copilot (AI) vs. key ERP competitors** (SAP, Oracle, Workday)
- **Full ERP solution** built on the open and extensible Microsoft cloud platform
- Robust partner ecosystem delivering industry-specific solutions: **90% of ERP revenue driven by partner engagement** and is **growing at 42% annually**

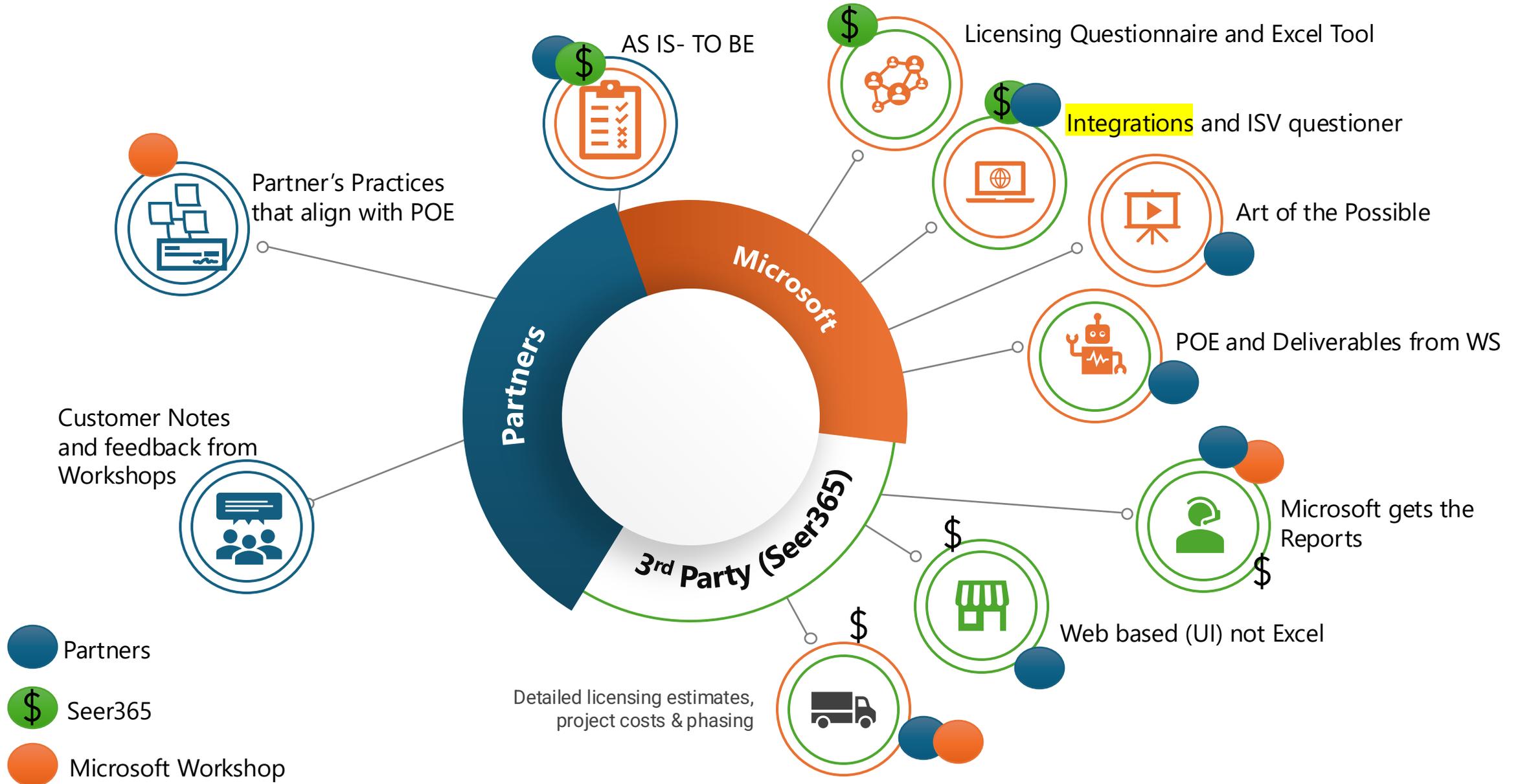
## Why Care?

- **ERP is the heart of business data.** If Microsoft wants to lead AI transformation, it is **critical for us to have the business data and underlying context**
- Market Size: **~\$95B by 2028** growing at 15% CAGR
- **Dynamics 365 revenue: \$1.4B** (largest category within Biz Apps)
- Microsoft continues to take share: Dynamics 365 **ERP growth rate 28%** (1.5x vs. market)

## Call to Action

- Leverage and pitch the ERP VnV workshop as a Microsoft initiative to help your customers to modernize ERP
- Consider ERP Vision and Value for all accounts including customers which may have a **competitive on-premise ERP**

# Modernization of ERP Workshop





# 79%

of leaders agree their company needs to adopt AI to stay competitive.

## AI is defining how leaders approach business growth imperatives

- Enhance business performance
- Profitably meet customer demand
- Overcome workforce shortages
- Mitigate cybersecurity threats
- Deliver on ESG goals

**60%** of leaders worry their organization's leadership lacks a **plan and vision** to implement AI.

# Partner Go-To-Market Initiative



Customer outcome

AI ERP helps customers rapidly introduce new products and services, enable sustainable production of high-quality goods, and deliver a seamless purchasing experience for their B2B and B2C customers



Partner execution

Drive ERP compete and Dynamics on prem migrations with Modernize ERP BOM and execute ERP Vision & Value-funded engagements. Use Copilot Studio and Copilot for Finance to accelerate Finance category growth

Achieve finance and supply chain specialization

Execute ERP Vision & Value to win on-prem ERP migrations

Develop partner packaged industry solutions that sell and deploy fast

Drive customer success by executing FastTrack's success by design

1

Listen and consult

Build pipeline

Create on-prem compete and Dynamics AX, GP NAV migration pipeline

Modernize ERP campaign in a box (11 languages)

Pitch decks

2

Inspire and design

Deliver

Deliver customer vision and quantify value

ERP Vision & Value

3

Empower and achieve

Win deal

Influence sales through art of possible tailored demo

Tailored demo: ERP MCI advisory fee (OSA)

4

Realize value

Deploy

Create deployment vision and blueprint  
Validate solution performance

Dynamics 365 Vision & Deployment  
Dynamics 365 FastTrack deployment

5

Manage and optimize

Drive

Optimize solution and increase user adoption

Dynamics 365 solution deployment  
FastTrack D365 COE

# ERP Vision and Value workshop Framework



Pre-sales



Stage 2



Variable

Accelerate customer intent to modernize their on-premises ERP systems with Dynamics 365. Develop a well-crafted vision of their future state, highlighting clear business outcomes, success metrics, and leveraging partner expertise.

## Customer Audience

Key decision makers: Finance leader CFO, VP of Finance

## Key influencers

Chief Operations Officer (COO), Chief Supply Chain Officer (CSCO), Chief Technology Officer (CTO), Chief Information Officer (CIO), Chief People Officer

## Partner Participants

Architect(s), Consultant(s)

### Assess



Conduct functional, technical, and business process analysis to deliver a gap assessment and prioritized solution outcomes.

### Art of the Possible



Envision and share product and partner expertise aligned with customer needs, leading to prioritized scenarios and clear business personas.

### Build the Plan



Develop a business value proposal that includes a project plan and a boardroom-ready business case.

The goal of this engagement is to drive your customers intent for modernizing their on-premises ERP systems to Dynamics 365 Finance and Dynamics 365 Supply Chain Management.

Welcome to Microsoft Dynamics 365 for Finance and Operations

# Customer Journey

SUCCESS



3

- Workshop Conclusion and Next Steps
- Partners Begin Migration Execution

2

- Initial Engagement with Customer
- Identify Pain Points and Goals
- Introduce the Workshop and Partners
- Comprehensive System Assessment with Partners
- Deep Dive Sessions with Users and Customers
- Show Art of the Possible with AI and Cloud
- Develop Strategic Build Plan with Partners
- Customer Alignment and Feedback

2

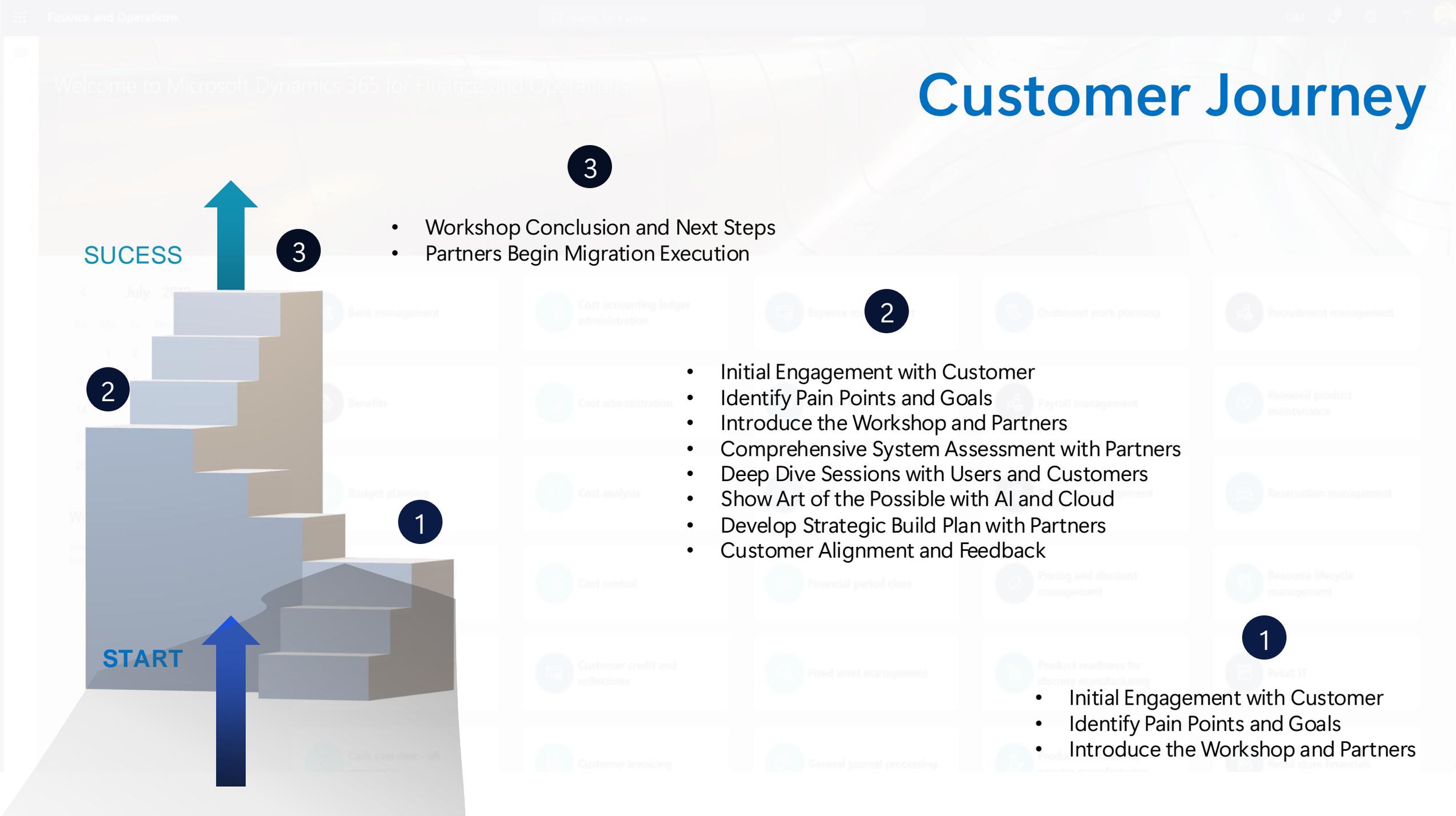
1

START



1

- Initial Engagement with Customer
- Identify Pain Points and Goals
- Introduce the Workshop and Partners



# ERP Vision and Value Framework



Customize Your Workshop: Tailored to Customer Needs and Industry Focus

# ERP Vision and Value Activities

|      | Assess  | Art of the Possible  | Build the Plan  |        |
|------|--|---|--|--------|
| Core | <b>Pre-Engagement Phase</b>  | Estimated   |  |        |
|      | Deliver the Pre-Engagement Call Meeting  | 30 Min  |  |        |
|      | Customer Questionnaire   | 60 Min  |  |        |
|      | ERP Modernization Workshop Overview  | 60 Min  |  |        |
|      | <b>Assessment Phase</b>  |   |  |        |
|      | 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  |  |        |
|      |  | <b>D365 Solution Demo's</b>   |  |        |
|      |  | 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   |        |
|      |  | <b>Art of the Possible Presentation</b>   |  |        |
|      |  | 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   |        |
|      |  |   | 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)

|          | Dynamics 365 Finance & Operations and Supply Chain Management |        | Copilot in Business Process |        |
|----------|---|--------|-----------------------------|--------|
| Pathways | Acquire to Dispose (Reprise)                                  | 30 Min | Demand Planning             | 60 Min |
|          | Order to Cash   | 30 Min | Project Operations          | 30 Min |
|          | Procure to Pay  | 30 Min |                             |        |
|          | Project to Profit   | 30 Min |                             |        |
|          | Record to Report  | 30 Min |                             |        |

# ERP Vision and Value Customer Journey



Pre-sales



Stage 2



Variable

**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.*

## Quick summary



### Target customer scenario(s):

- Operating an existing on-premises ERP solution, Microsoft and Compete ERP



### Partner qualifications\*

**Business Applications Solution Partner Designation**



### Customer qualifications\*

- Valid, Open, [MSX Opportunity ID, and TPID listed](#)
- MCEM stage: Inspire and Design
- Minimum estimated Annual Contract Value (ACV) of \$50k USD on at least one or a combination of:
  - Dynamics 365 Finance; Supply Chain Management;
  - Dynamics 365 Commerce; Human Resources;
  - Dynamics 365 Project Operations
- Licensing = EA, CSP, OSPA
- Segment = Enterprise/Corporate

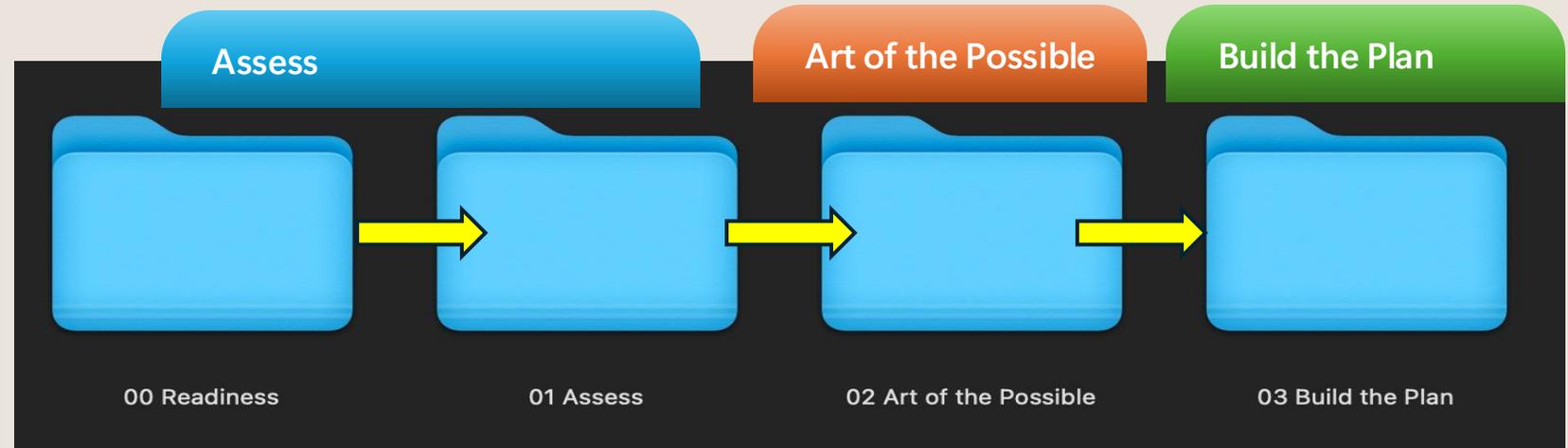
**How the Workshop Sets You Up for  
Success and Accelerate the Presales?**

## Ramp up with Delivery Guide

Delivery guide provides step-by-step instructions on how to conduct each phase of the workshop. It includes detailed checklists, timelines, and best practices.

[Aka.ms/ERPvNv](https://aka.ms/ERPvNv)

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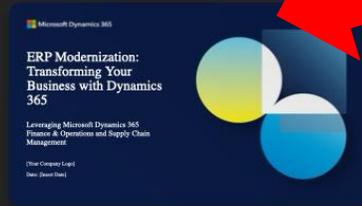
# 00 Readiness



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00 Your invitation ERP Vision and Value Workshop-...emplate\_v24.07.oft



01 - ERP Vision and Value Workshop Presales Deck\_v24.07.pptx



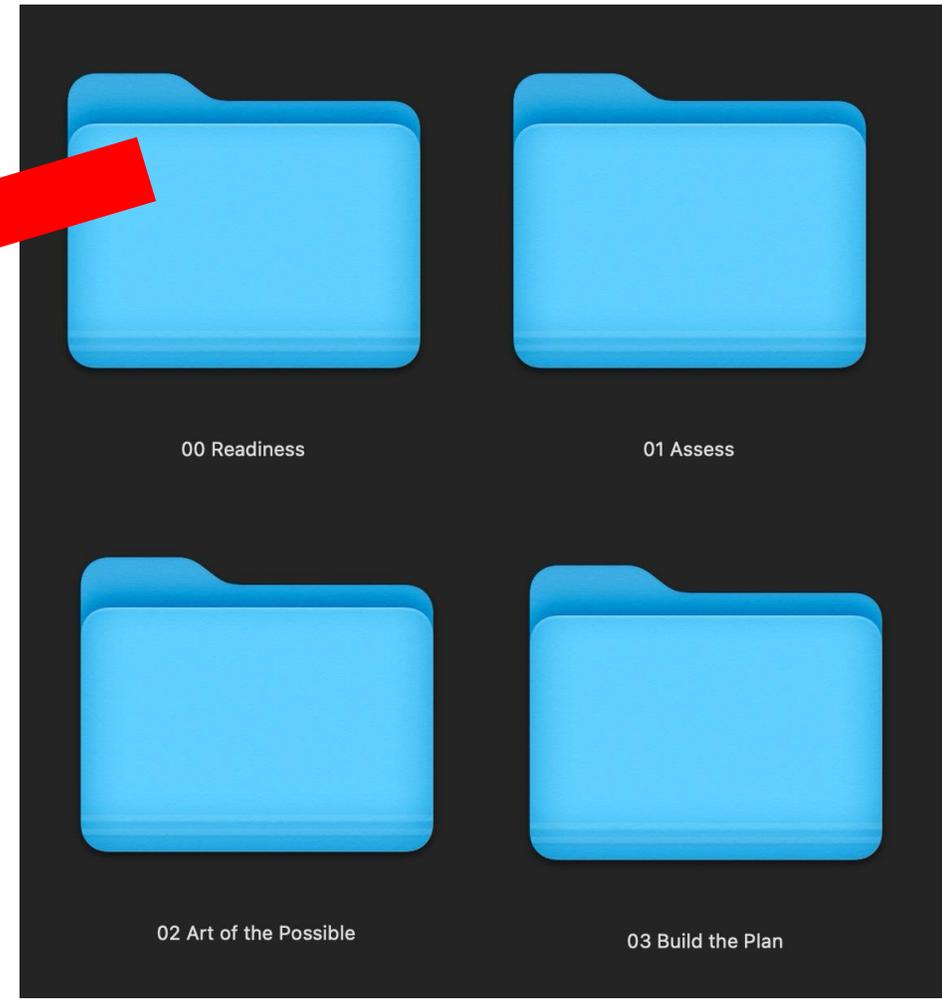
02 - ERP Pre-engagement Call\_v24.07.pptx



03 - ERP Modernization workshop - Delivery Guide\_v24.07.pptx



Webinar ERP Vision and Value - June 26th\_v24.07.pptx



Download from: [Aka.ms/ERPvNv](https://aka.ms/ERPvNv)



Future-proofing ERP with cloud and AI solutions.

# ERP Vision and Value Workshop



Workshop Flyer

## Workshop highlights

**Assessment:** Identify the gaps in your current on-premise ERP solution. Assess what you need. Outcome: Gap-fit proposal and migration and license cost estimate.

**Envisioning:** Workshop addressing the challenges and growth blockers of your ERP solution of your business today and the vision where you want to be in the future. Outcome: Art of possible with Finance & Supply Chain (Security, MW, ..)

**Business Value:** Brining the assessment and envisioning together to provide you with the cost and benefits of your new Finance & Supply Chain ERP solution: Outcome: Business proposal for your leadership team

**Develop a custom implementation blueprint:** Create a tailored solution blueprint for your organization, guiding you through the implementation of Dynamics 365 F&O and SCM for maximum efficiency and ROI.

Is your current on premise ERP solution preventing you from reaching your business goals? Does it meet industry and regulatory compliance requirements? Are can it harness the power if AI to help you make data driven decisions to accelerate business growth?

### Modernize your legacy on premise ERP with Copilot (AI) Powered ERP from Microsoft Dynamics 365 Finance & Supply Chain

Today's businesses are striving for more efficient and streamlined operations through modern ERP systems. With 95% of organizations adopting cloud solutions, it's crucial to manage and optimize these systems effectively. ERP modernization enhances operational efficiency and unlocks new opportunities for growth.

With organizations increasingly relying on advanced technologies and AI to drive business growth, this workshop will show you how to transform your core business processes, integrate cutting-edge technologies, and ensure compliance while optimizing your decision-making capabilities.

"Our Workshop encompasses a comprehensive approach to transforming core business processes, integrating advanced technologies, optimizing operational efficiency, and enhancing data-driven decision-making capabilities through Microsoft Dynamics 365 Finance & Operations and Supply Chain Management."

## Why you should attend

Experience the transformative power of modern ERP systems in your own environment.

This workshop will show you how to leverage AI-driven insights, advanced analytics, cloud integration, seamless automation, and optimized business processes with Microsoft Dynamics 365. By attending, you can:

**Learn** to integrate cutting-edge technologies and AI to drive data-driven decision-making and business growth.

**Discover** how to modernize and optimize your ERP functionalities to enhance operational efficiency.

**Secure** your ERP system's compliance while optimizing its performance.

**Enable** your users to maximize productivity with the ERP solutions they need, on the platforms they prefer.

## What to expect

Gain an executive deep dive into the modernization, optimization, and security of your ERP system with Microsoft Dynamics 365. Our goal is to show you the best strategies to enhance your ERP business processes, integrate advanced technologies, and drive business growth. We'll provide you with the tools to optimize your business operations, ensure compliance, and leverage AI-driven insights for better decision-making.

## We'll work with you to:

- **Transform core business processes:** Learn from leading experts how to modernize and optimize your ERP processes and functionality to enhance operational efficiency by revising and updating business processes.
- **Ensure secure compliance:** Secure your ERP system's compliance while optimizing its performance.
- **Maximize cloud benefits:** Explore the advantages of cloud integration for streamlined ERP operations.
- **Leverage advanced technologies:** Discover how to integrate AI-driven insights, advanced analytics, and seamless automation with Microsoft Dynamics 365.
- **Enable user productivity:** Empower your users with the ERP solutions they need on the platforms they prefer, ensuring productivity and flexibility.

## Engagement set up



Design business process opportunities with Experts in the Industry

Workshop takeaways for you



Customer value conversation



Discovery session for Dynamics 365 FnO and SCM with Art of the Possible



Key results, recommendations and next steps to modernize your ERP

Asses your current ERP and future needs

Assist you to identify and understand your needs

## Who should attend

The workshop is intended for security decision-makers such as:

- Chief Information Security Officer (CISO)
- Chief Information Officer (CIO)
- Chief Security Officer (CSO)
- ERP manager
- Application business owners
- IT Architect
- IT Operations
- Solutions Architect
- Security Engineers

## Why [Partner Name]?

Gain an executive deep When it comes to unified endpoint management you need an experienced partner, [Partner to insert their personalized information on value proposition, experience, Microsoft 365 features knowledge, and/or services.]



Contact us today to get started!

[Microsoft partner] [contact email] | postal address | website URL]

# Unlock your potential with AI-powered business systems

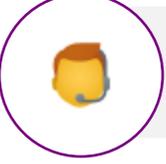
Dynamics 365 Copilot powered by AI for every line of business

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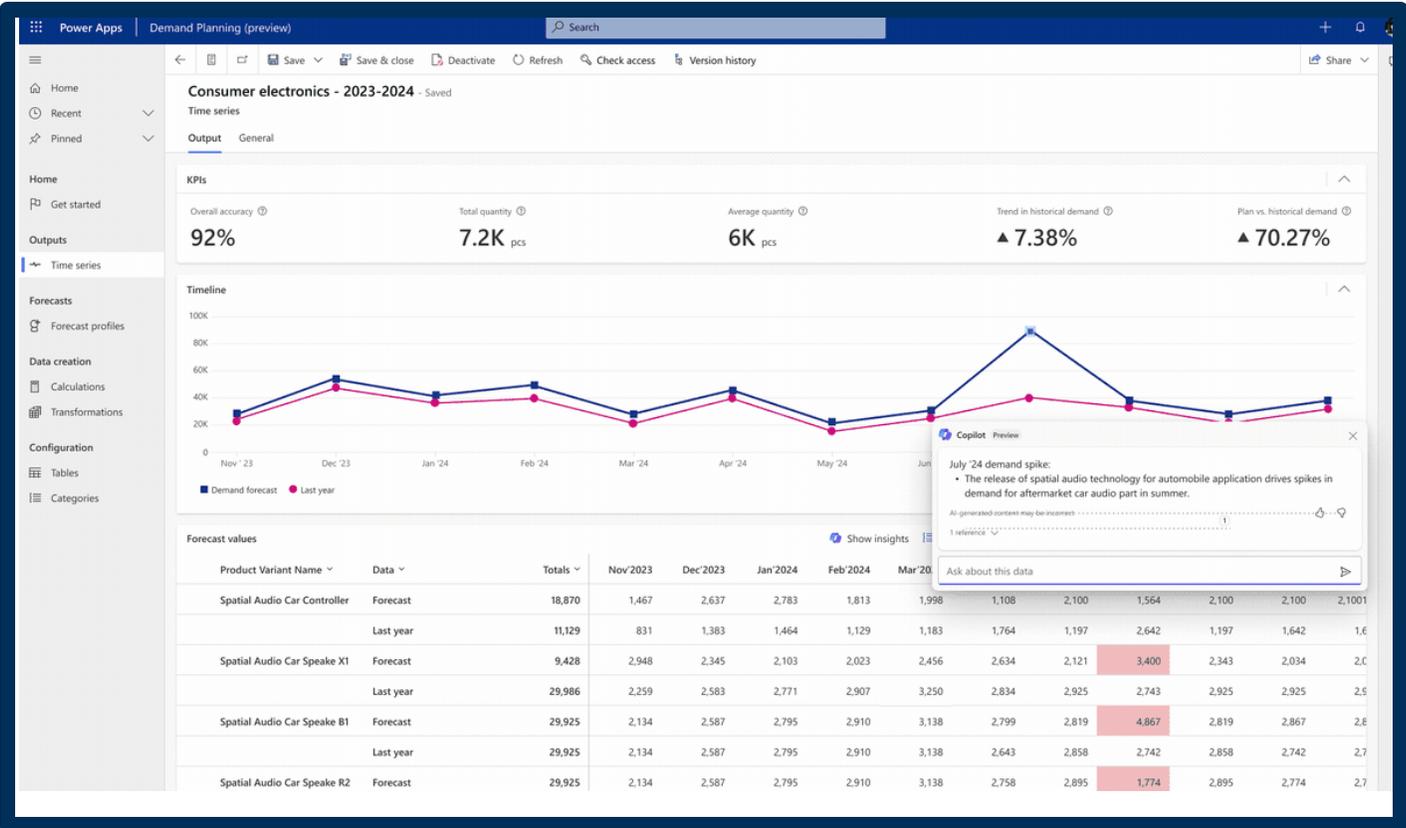
**Finance**  
Increase successful collection rates and company cash flow
- 

**Supply Chain**  
Proactively mitigate risk with enhanced collaboration and rapid actioning
- 

**Projects**  
Deliver projects on time and budget with AI-powered tools
- 

**Sales**  
Communicate with customers more effectively
- 

**Customer Service**  
Turn service agents into super agents and enrich self service



# Microsoft Dynamics 365

## Optimize finance and supply chain management

### Create a connected enterprise with agile, AI-powered ERP

Dynamics 365 can help you optimize finance and supply chains to create a connected enterprise by infusing AI, automation, and analytics into every enterprise resource planning (ERP) process. Confidently move to cloud with AI-powered ERP and unlock the agility needed to lead the way in today's rapidly evolving marketplace.

### Partner guidance

Set your Microsoft business apart from rivals by boosting revenue through a cloud-based business management solution tailored to address the current challenges facing small to medium-sized businesses (SMBs). Utilize this guide to engage with your clients and assist them in progressing forward.

### Target customers

Both SMBs and Enterprise customers seeking to modernize legacy ERP

### Target audience

**BDMs:** *Primary:* CFO | *Influencers:* COO, CSCO, CTO, CIO

### Know your customer's situation

Understand customers current ERP stack, related pain points, and opportunities

Legacy systems prevent hamper agility and flexibility, constraining growth

Inefficiencies and data silos due to multiple, disconnected systems

Zero tolerance for risk of security breach or data loss

### Top concerns include

Desire a cloud-based architecture to support growth

Sensitive to being left behind with outdated technology

Need technology that will evolve as needs change and enables business model innovation

Concerned about integrating legacy and emerging technology

### Benefits of ERP Modernization

Improve **security**, privacy and reliability

With the proliferation of cyberthreats, you can't compromise the protection of your core business data. Choosing a vendor with a proven track record of security investment and innovation provides peace of mind as you empower more people with data.

Enable **scalability**, flexibility and easier on-boarding

Provision Dynamics 365 in minutes with a scalable, cost-effective solution that works with your existing investments.

Connect data fabric

Bring together data stored in disparate applications and locations in a way that makes it possible for anyone to access, analyze, and act on it, securely and through familiar apps and experiences.

Adapt to your **business needs** with a composable architecture

A composable system can be updated by adding or removing components instead of customizing the core system so you can update and adapt your platform as your needs evolve.

Reduce the cost of **maintaining hardware**

Reduce time and money spent on infrastructure refreshes, major software and hardware updates, utility costs, and maintenance by shifting to the cloud.

**Modernize** at your pace

Modular finance and supply chain solutions that work together and with your current business systems.

# Provide context

Your workshop should start with a slide that briefly describes the customer's current situation and provides an overview of the issues and challenges with their current systems and processes.

## Remember to...

Clearly identify the value you intend to drive toward.

## Answer key questions...

- Why are you doing this?
- Is it just a rip-and-replace effort, or does the implementation represent an opportunity for digital transformation?
- Or does it allow you to innovate business models?

## Why are you considering ERP modernization?

- <Insert reason 1>
- <Insert reason 2>
- <Insert reason 3>

### *[Examples]*

- Reduce risk: Concerned with current system capability to secure and protect data and ensure your business complies with the latest data privacy regulations.
- Current ERP is a barrier to growth, and is expensive to operate
- Legacy system is outdated and unable to leverage modern tech like mobile, cloud, and real-time analytics
- Simplify operational complexity and increase productivity
- Gain deeper business insights to foster innovation and growth
- Disconnected project, time, and expense management tools that prevent employees from delivering their best work.

## Our challenges are:

- <Insert challenge 1>
- <Insert challenge 2>
- <Insert challenge 3>

### *[Examples]*

- Integrating legacy and emerging technology
- Delivering timely financial insights
- Adopting new business models
- Workforce transformation
- Deploying appropriate financial controls
- Multiple ERP systems, too many service contracts, unreliable connectivity between locations, or slow consolidation of financial reporting.
- Data silos that make access to accurate reports and timely insights difficult.
- Current ERP can not keep pace growth, we need to scale on demand

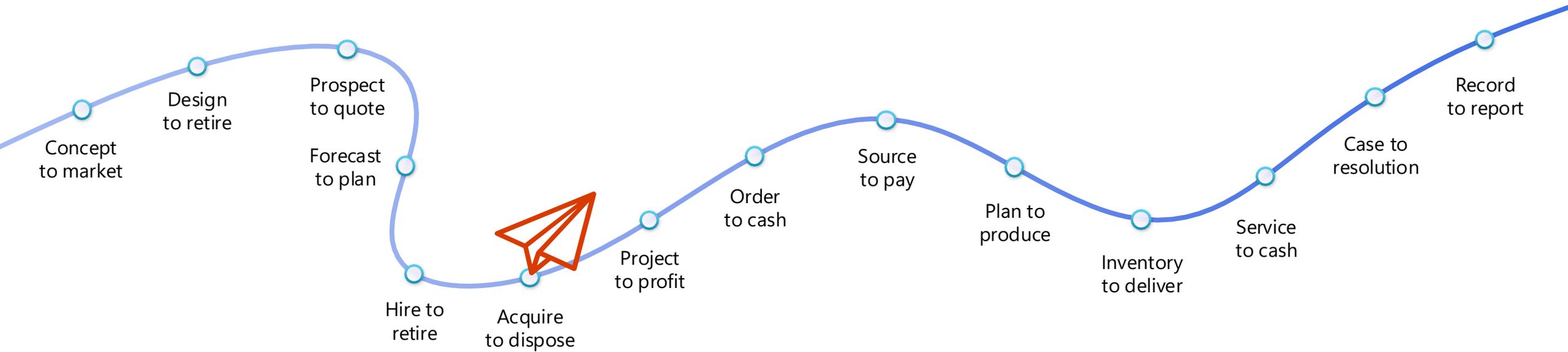
## What new capabilities and outcomes will drive value?

- <Insert value driver 1>
- <Insert value driver 2>
- <Insert value driver 3>

### *[Examples]*

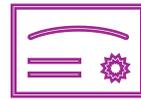
- Reduce the need and cost of managing on-premises ERP
- Enable faster expansion and anywhere access by migrating to a cloud-based ERP platform
- Leveraging digital technologies like artificial intelligence and automation to improve business process efficiency.
- Utilize automation to reduce manual intervention and time-consuming workarounds
- Adapt faster to changing business needs by moving away from expensive customizations to modern, low code capable solution

# We are building Demos and Process content

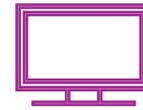




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Resources to help you grow profits.

Home > Learning paths >

# Welcome to Microsoft 365 Partner Readiness Hub

Become proficient and stay up to date on Microsoft 365 and Security. Learn and how to develop and sustain your business practice and refine your presales and technical skills.



## Explore content by solution categories

Get started by exploring key solution categories to learn more about Microsoft 365 and Security, Compliance, and Identity.



## Find a learning path

Select a curated learning path and explore modules that can be tailored to your role and proficiency.



## Customize your learning path

Create a custom learning path that will help you skill up to reach your goals and differentiate yourself in the market.

# After the workshop, your customer will...



## Identify Fits and gaps in their current ERP system

Customers will have a detailed assessment of their existing ERP system, clearly identifying pain points and gaps that need to be addressed through modernization.



## Envision the future with Microsoft D365

Customers will see how Microsoft D365 Finance and Operations (FnO) and Supply Chain Management (SCM) can modernize their business processes, leveraging AI-driven insights and automation for enhanced efficiency and decision-making.



## Receive a customized modernization plan

Customers will obtain a strategic roadmap, including a fit-gap analysis, project planning, and a statement of work, tailored to guide their transition to a modernized ERP system.



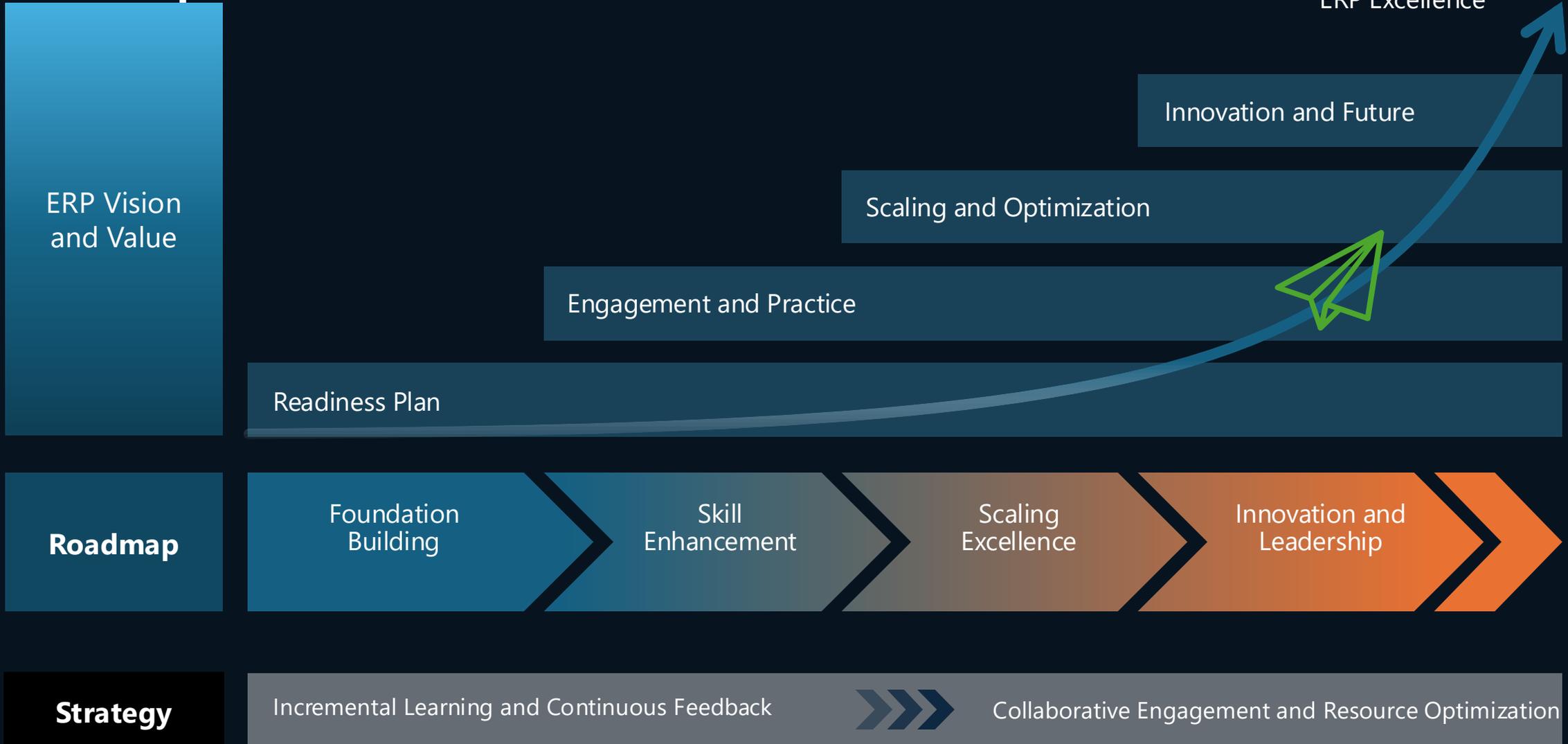
## Be Equipped with actionable insights and support from experts

Customers will leave with critical insights into Microsoft ERP systems and actionable steps for using Dynamics 365 FnO and SCM. Continued support from Microsoft's expert partners will ensure seamless implementation and enhanced efficiency.

## Call to Action:

Bring the Workshop to Your Customers, Share Your feedback, and Help us Make It Even Better

# Our plan for ERP Readiness and Enablement ERP Excellence



# ERP Modernization Workshop | Content links and guides

## Ramp up with Delivery Guide

Delivery guide provides step-by-step instructions on how to conduct each phase of the workshop. It includes detailed checklists, timelines, and best practices.

## Download the ERP Modernization Workshop kit

This kit includes presentation templates, assessment tools, case studies, demo scripts, and more.

## Accelerated Presales Workshop Content

Utilize pre-built demos, use cases, and success stories provided by Microsoft to quickly illustrate the potential of D365.

[aka.ms/ERPvNv](https://aka.ms/ERPvNv)

## GET IN TOUCH

Please reach out with more questions and to chat!



[linkedin.com/ragnarpitla](https://www.linkedin.com/company/ragnarpitla)



[ragnarpitla@microsoft.com](mailto:ragnarpitla@microsoft.com)



[Youtube.com- @pitlaragnar](https://www.youtube.com/@pitlaragnar)

The image shows a LinkedIn profile card for Ragnar P. The header features a search bar with the text "What would AI-powered autonomy look like for your business?" and a background image of a Microsoft building. Below the header is a circular profile picture of Ragnar P. To the right of the profile picture, it says "ERP Architect at Microsoft" and "@PitlaRagnar" with a YouTube icon. The main text of the profile reads: "Ragnar P" followed by the Microsoft logo. Below that, it says "ERP Architect @Microsoft | Helping Organizations Modernize with Cloud & Autonomous AI with Dynamics 365 Finance, SCM & Copilot | Envisioning Digital Transformation with GTM+COE | Content Creator (YouTube - @PitlaRagnar)".

**Thank you**