

MICROSOFT 365 AS A PLATFORM

Dynamics, Office and the rest of Microsoft's tools

July 14, 2021

Presenter





Bob Kanzler

Principal

Leader of our Northeast and Southeast practices

Industry focus on Not for Profits

Philadelphia, PA office

Bob.Kanzler@rsmus.com



MICROSOFT INDUSTRY CLOUDS



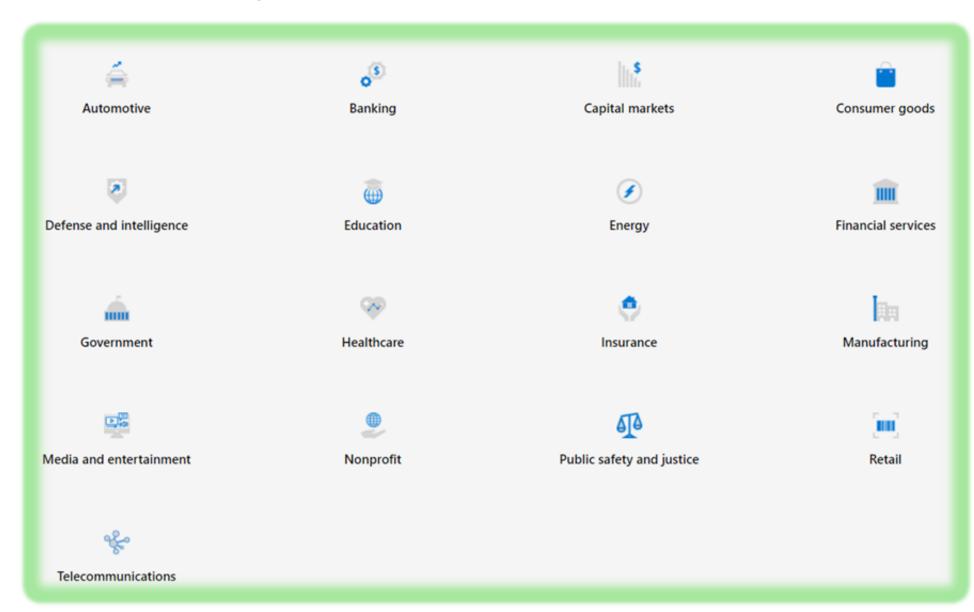


Microsoft is the productivity and platform company for the mobile-first and cloud-first world.

Satya Nadella

Microsoft's industry clouds

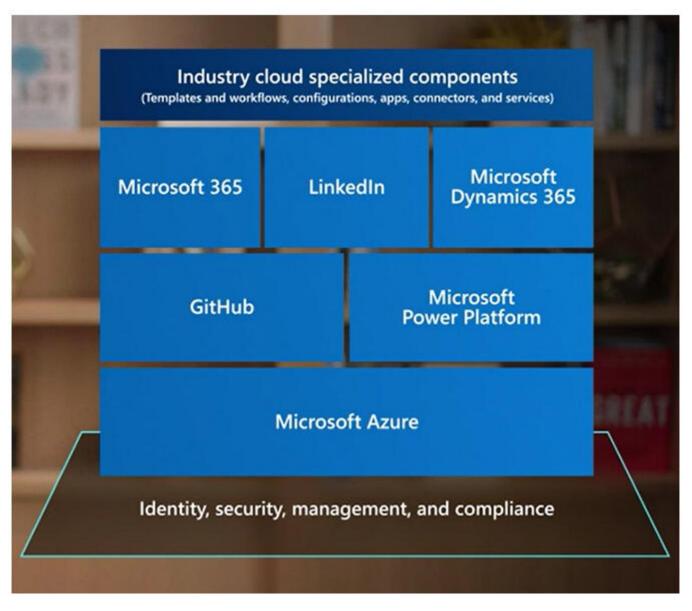




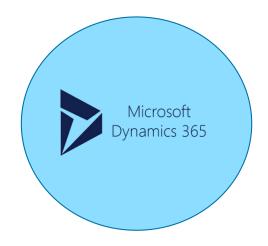
Microsoft's industry clouds

RSM

- Address industry-specific needs utilizing all the power of the Microsoft ecosystem
- Approach problems and opportunity with technology, not packages
- Drive a process regardless of system



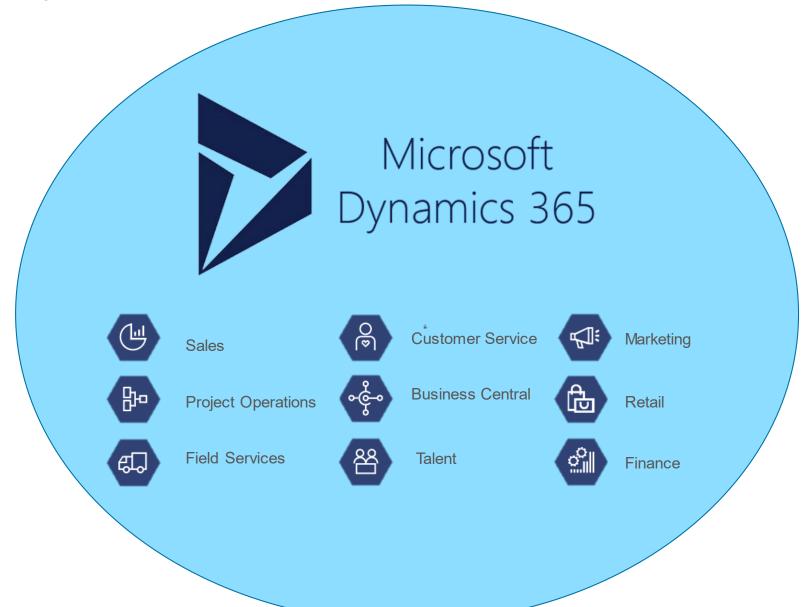




MICROSOFT DYNAMICS

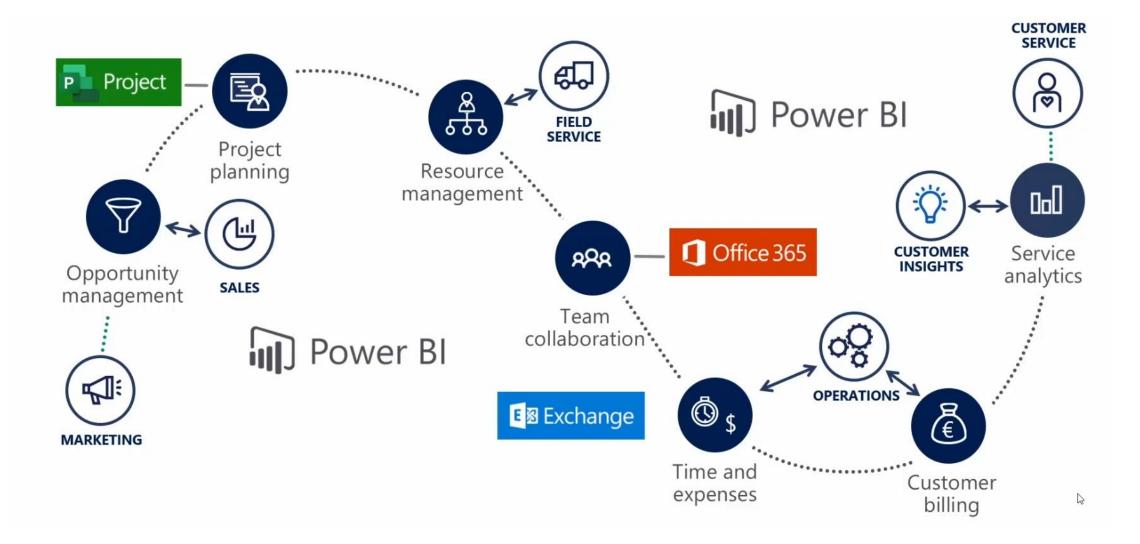
Microsoft Dynamics





Dynamics 365 capabilities





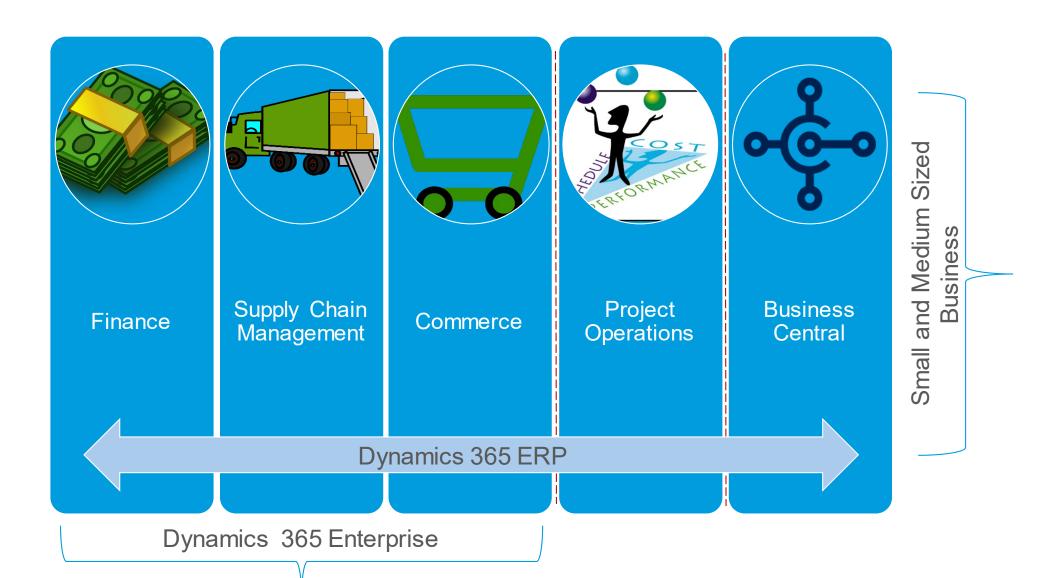
Dynamics 365 Marketing



Multi-channel campaigns	Email Marketing	landing pages & forms	Webinars, phone calls & In-person events	LinkedIn Connector
Lead Nurturing	Campaign designer	360 degree view	Behavior based lead nurture	Lead prioritization
Embedded intelligence	Multiple lead scoring	Dynamic segmentation	Customer Insights	Notifications
Event management	Webinars using ON24	Events portal	Attendance tracking	Speaker management
Reporting	Dashboards	Surveys	Embedded PowerBI	Configurable

What are Dynamics 365 ERP solutions?

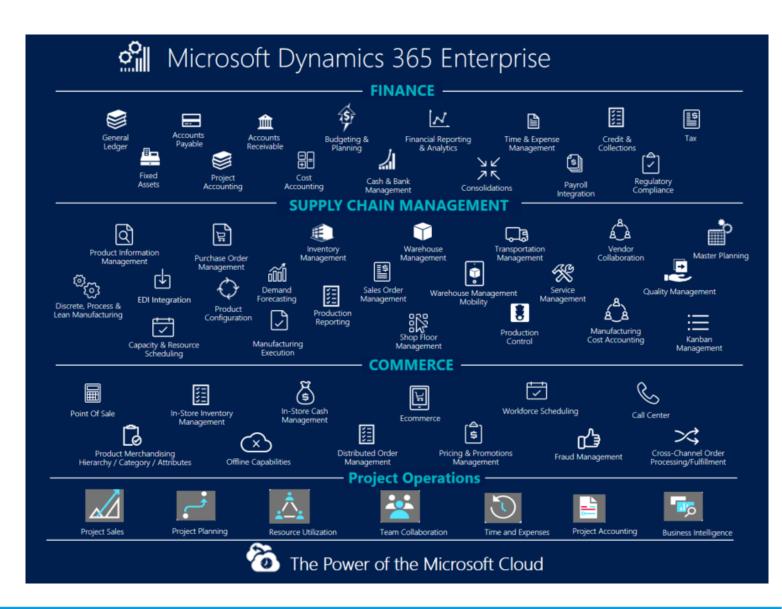






Dynamics 365 Enterprise

- G/L, A/P, A/R
- Credit and Collections
- 3-way match
- Cash and bank reconciliation
- Multi-company, department, currency
- Org structure based, dimensional chart of accounts with controls
- Budgeting
- Consolidation and Elimination
- Sales tax, 1099's, compliance, audit trail
- Financial reporting
- Excel interoperability



Dynamics 365 Business Central

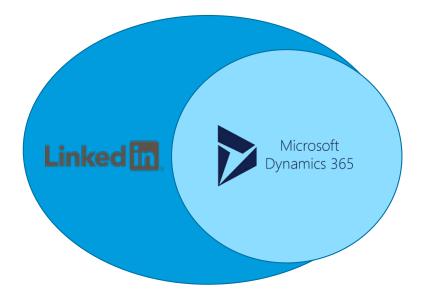










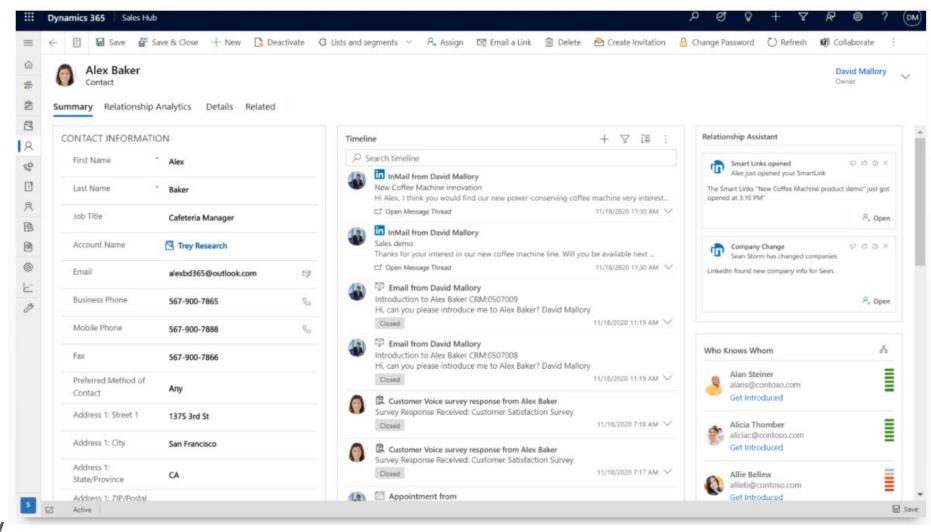


LINKEDIN

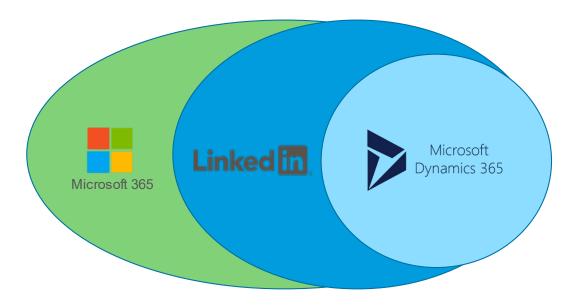
Dynamics and LinkedIn Sales Navigator



- Drive engagement with personalized content
- Take the next best action
- Streamline customer research
- Unified view of interactions
- Identify people most likely to buy





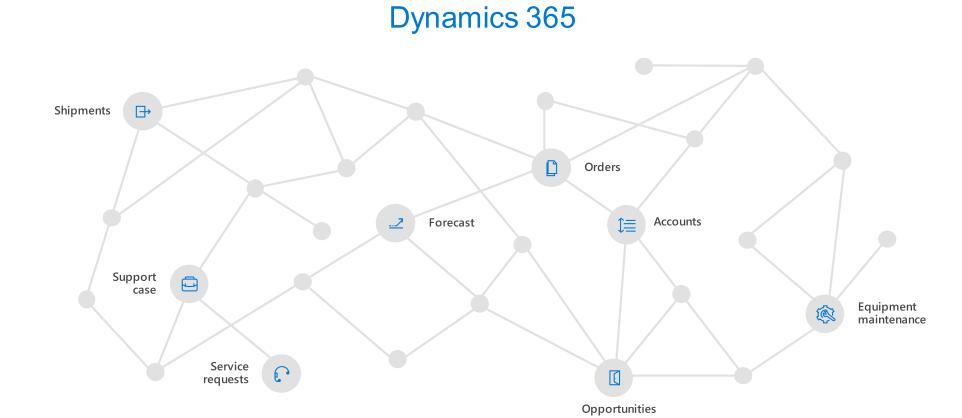


MICROSOFT 365

Formerly Office 365



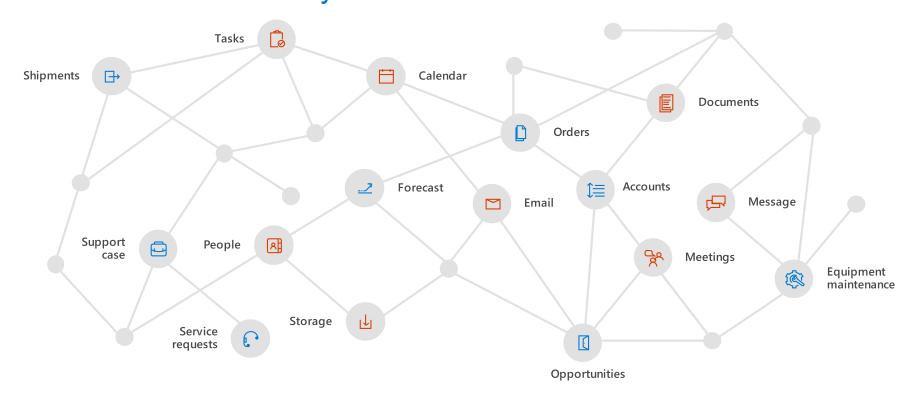
Connecting data





Connecting data

Dynamics 365 + Office





Connecting data

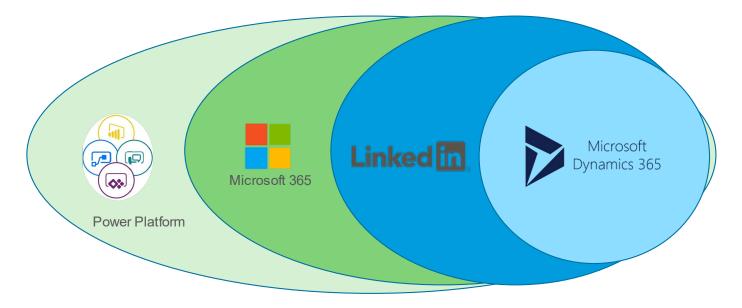
Dynamics 365 + Office + LinkedIn Relationships Tasks Shipments Calendar **Documents** Job History Orders Talent Accounts Forecast ∁≣ Email Message Support People case Meetings ** Skills Equipment maintenance Storage Professional Service contacts requests Opportunities

Dynamics 365 with Office/Microsoft 365





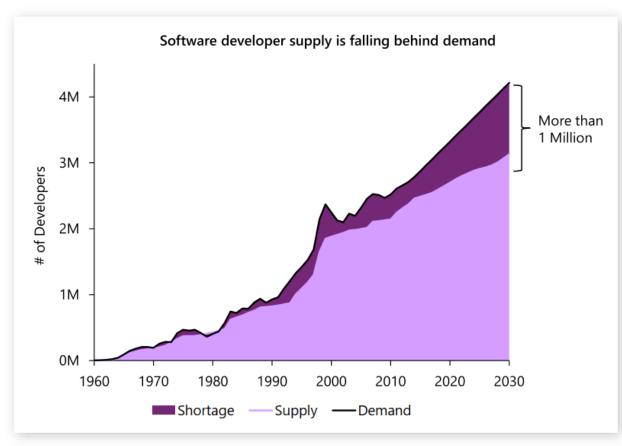




POWER PLATFORM

Challenge – falling behind!







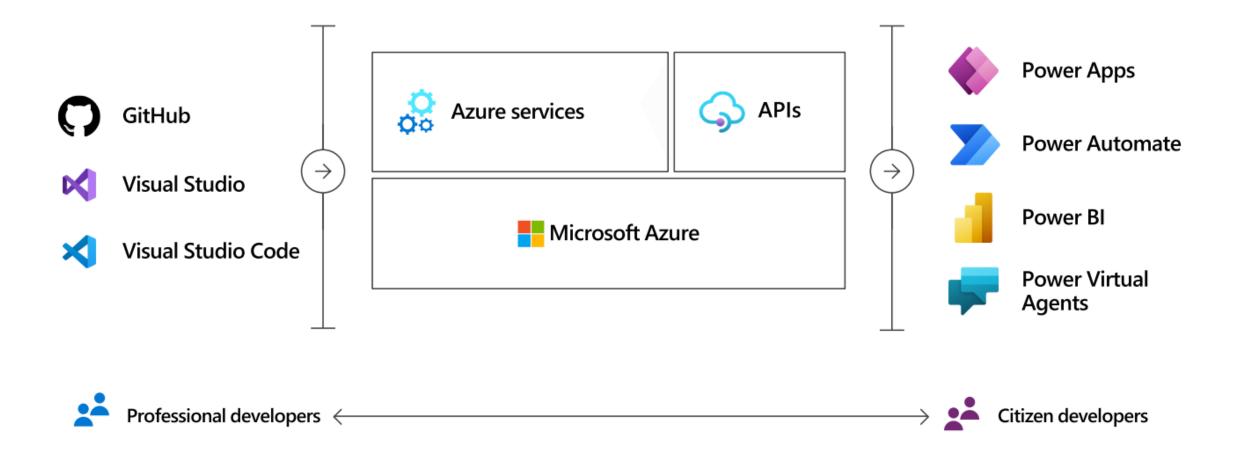
¹ IDC FutureScape: Worldwide IT Industry 2020 Predictions. Doc # US 45599219, October 2019

² Gartner, How to Deliver Enterprise Mobile Apps Faster – 2017

³ Patrick Moorhead, Microsoft goes all-in on hybrid Cloud and Edge at Ignite 2019, citing Indeed survey, Forbes.com, Nov 2019

What is it? A low-code solution for your organization





Speed matters



Power Apps + Azure

Deeply integrated for faster app development



Meet demand faster

Build apps quickly with easy pro-dev customization, reusable components, and low code development and deployment tools.



Reduce your costs

Reduce cost by leveraging your existing investments, saving on development costs, and democratizing app development.



Seamless app management

Built-in security, governance, and compliance capabilities enable users to seamlessly manage their Power Apps solutions.



Effortless integration and extensibility

Over 350 out of the box connectors and integration with Azure services make it simple to integrate and extend your Power Apps solutions.

Extendable across many platforms





ERP extensions

Build extensions to SAP, ServiceNow, Workday, Salesforce and other ERP platforms in a cost-effective way to quickly adapt to changing regulatory and compliance environments.



Al Builder + Azure Al

Enable low-code AI to speedup your application development cycles through built-in cognitive services like binary classification, forms processing, object detection, and text classification with AI Builder + Azure AI.



Accessible pro-dev with code components

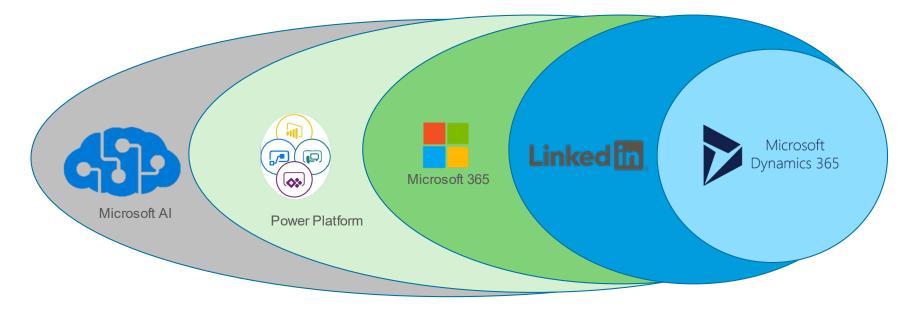
Professional developers and app makers can create code components for model-driven and canvas apps, optimized for performance and reusability.



Embed apps with 350+ connectors

Embed custom apps where you need them by using one of Power Apps' 350+ connectors to integrate apps into websites and other services, like Power BI and SharePoint.





MICROSOFT AI

Al solutions



Sales Insights add-in for Dynamics 365 Sales

Increase sales and improve decision making with Al-powered insights fueled by customer data.

Customer Service Insights for Dynamics 365 Customer Service

Leverage Al-driven insights to make better decisions and proactively improve customer satisfaction with confidence.

Dynamics 365 Fraud Protection

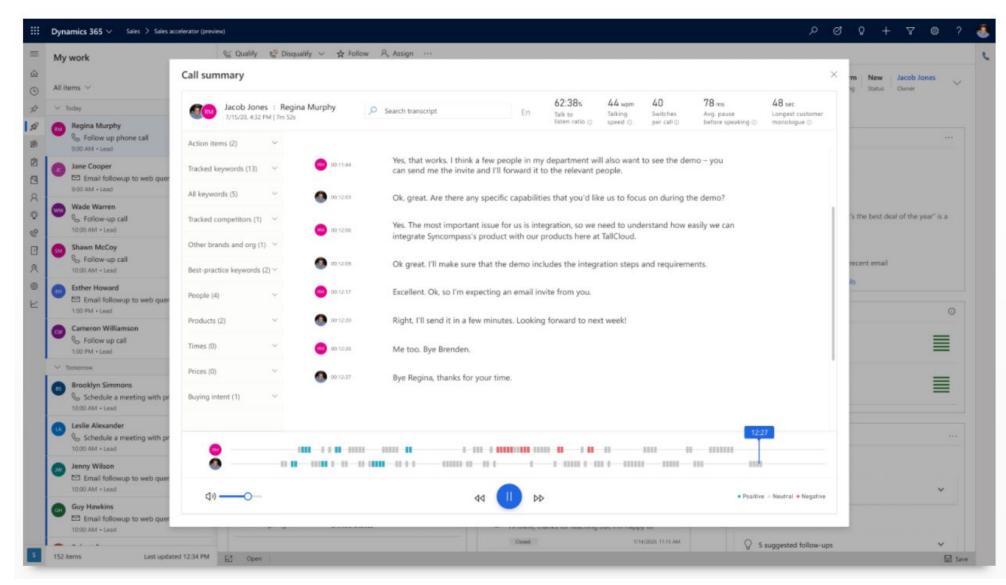
- Help protect your e-commerce business—and your customers—against fraud and improve your shopping experiences.

Sales Insights for Dynamics 365 Sales



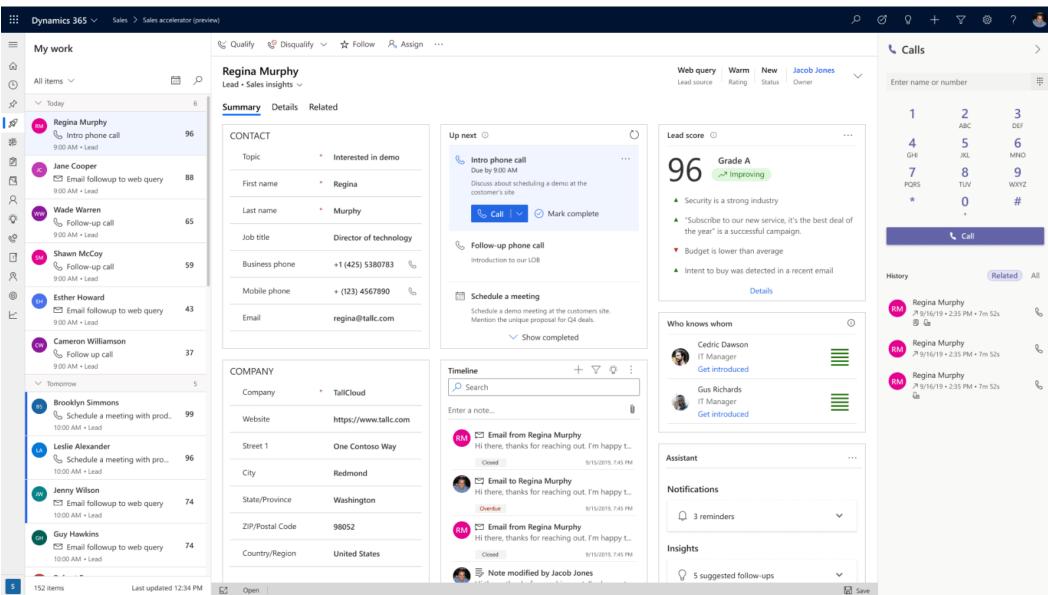
Communicate more effectively with Al-powered sales insights

Enhance empathy by using Al-powered conversation intelligence in calls to detect customer emotion, sentiment and priorities.



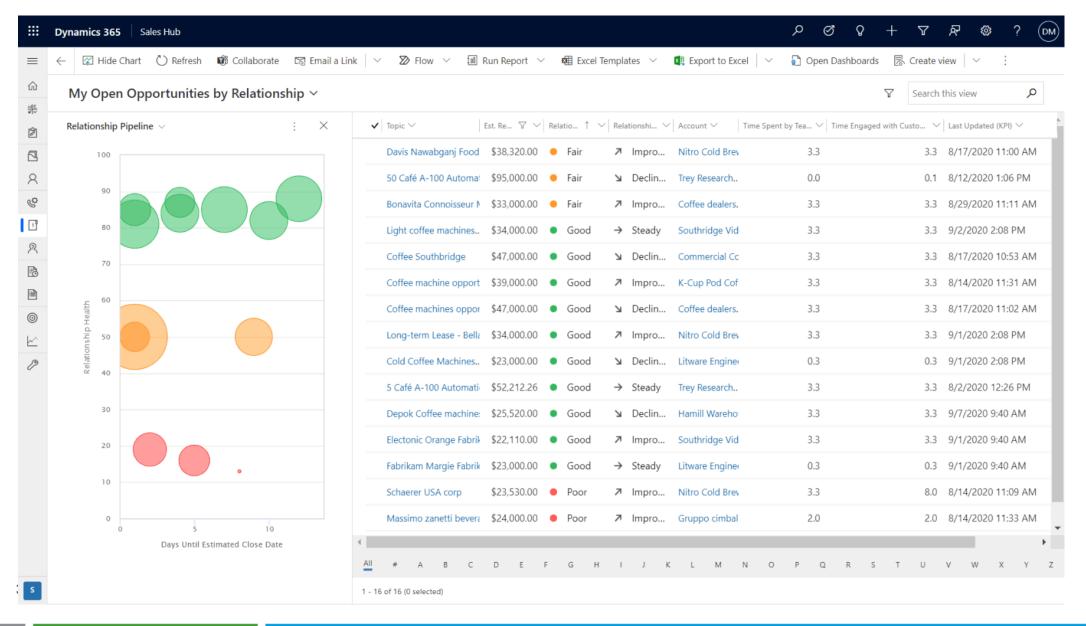
Sales Insights





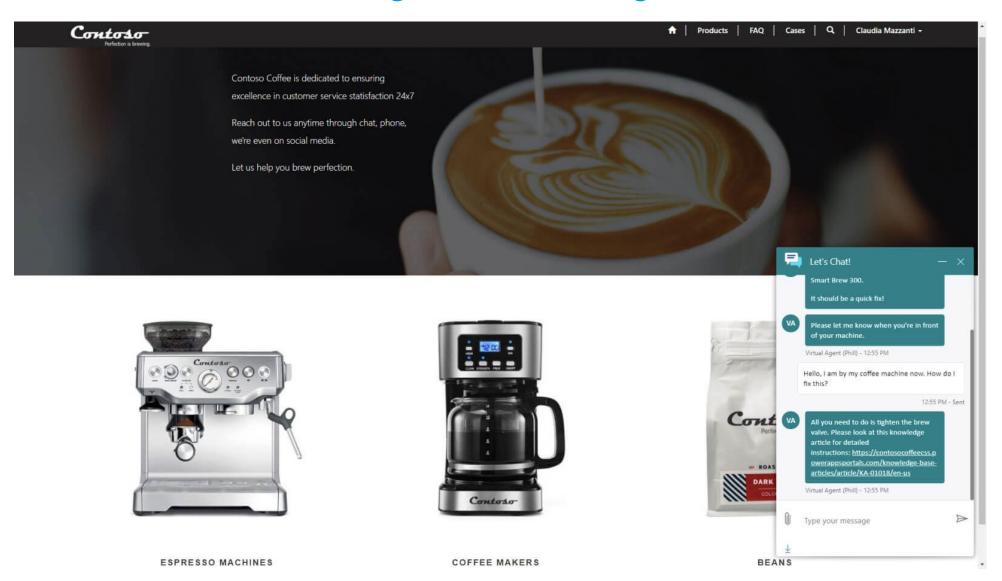
Relationship sentiment





Customer Service Insights – virtual agents





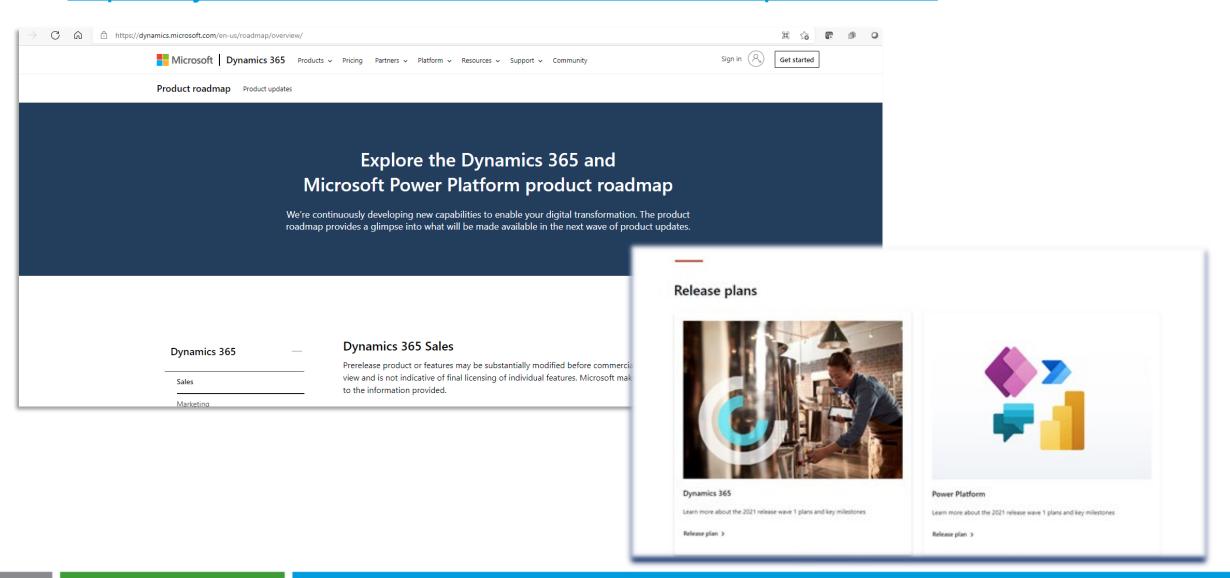


ADDITIONAL INFORMATION

Dynamics and Power Platform



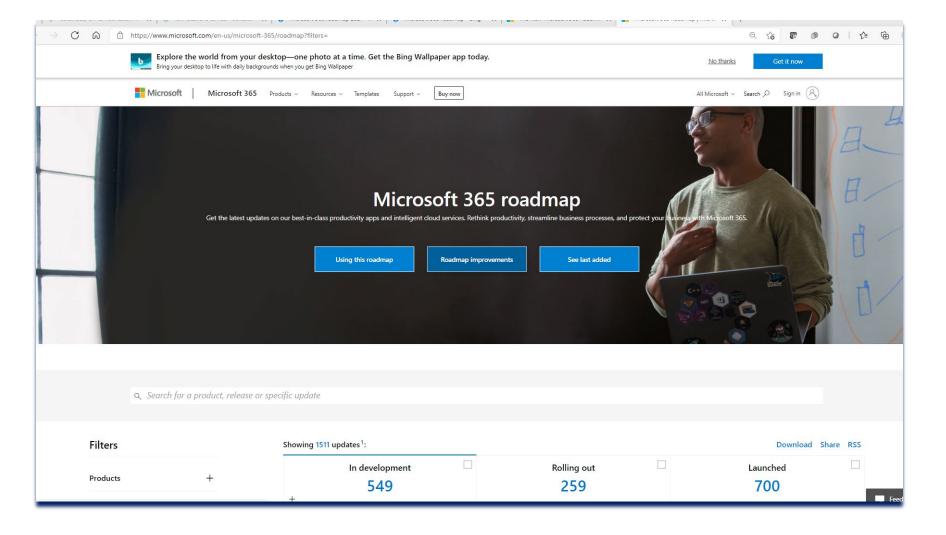
https://dynamics.microsoft.com/en-us/roadmap/overview/



Microsoft 365 (formerly Office 365)



• https://www.microsoft.com/en-us/microsoft-365/roadmap



THANK YOU FOR YOUR TIME AND ATTENTION



QUESTIONS AND ANSWERS





RSM US LLP

30 South 17th Street Suite 710 Philadelphia, PA 19103

267.419.2220

rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and the power of being understood are registered trademarks of RSM International Association.

© 2021 RSM US LLP. All Rights Reserved.