DYNAMICS 365 PROJECT OPERATIONS

1/13/2021

RSM

Agenda

Introduction

Overview

What is Dynamics 365 Project Operations

Product capabilities

Digital Transformation

Demo

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Introduction

John Annunziato

Director

National Project Operations Director

12+ years experience with the Dynamics Platform

RSM Dynamics Practice

- 800+ Consultants and growing
- Dynamics 365 Field Service
- Dynamics 365 Sales
- Dynamics 365 Customer Service
- Dynamics 365 Project Operations
- Dynamics 365 Marketing
- Dynamics 365 HR
- Dynamics 365 Business Central
- Dynamics 365 Finance and Supply Chain

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About RSM

Bob Scott's TOP 100 VARS

RANKED #1

5 years consecutively

accountingTODAY THE 2018 VAR 100

RANKED #1

4 years consecutively

VAR Stars
Bob Scott's Insights

Channel Futures.
MSP 501
2018 WINNER
RANKED TOP 10

Microsoft Partner
Gold Midmarket Solution Provider
Gold Enterprise Resource Planning
Gold Cloud Productivity
Gold Customer Relationship Management
Silver Small and Midmarket Cloud Solutions

INNER CIRCLE
for Microsoft Dynamics

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Overview…

Project Operations is the incorporation of existing mature project management products.

Dynamics 365 Project Service Automation

Project-based sales capabilities including quotations and resourcing.

Dynamics 365 Finance

Project management, costing, and accounting capabilities.

Microsoft Project

PM and PPM solutions-from small projects to large initiatives.

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The services economy is evolving, and organizations need:

Flexible ways to respond to changing business models in the services world

Automation of business processes from lead to billing to insight

Optimization of their workforce and productivity to ensure project success

What is Dynamics 365 Project Operations?

Empower services organizations with the visibility, collaboration and insight needed to drive success across operations – from prospect to cash. **Microsoft Dynamics 365 Project Operations** connects sales, resourcing, project management, and finance teams within a single application to win more deals, accelerate project delivery, and maximize profitability.

Project Sales | **Project Planning** | **Resource Utilization** | **Team Collaboration** | **Time And Expenses** | **Project Accounting** | **Business Intelligence**

COO / Practice Director

Account Manager

Project Manager

Partner Manager

Resource Manager

Team Member

Project Accountant

Project Operations uncovered

Anyone that is familiar with Project Service Automation that came out in 2016 and was sold until October 1, 2020 (Version 3.x) should have some familiarity with the new product.

Project Operations is…

- Project Service Automation 4.0
- Major new enhancements are
  - Project Online integration
    - Gantt Chart
    - Kanban Board
    - WBS
  - Advanced Billing Functionality
    - T&M
    - Fixed Price
    - Not-To-Exceed
    - Retainers
  - Native Integration to D365 Finance

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MICROSOFT DYNAMICS 365 PROJECT OPERATIONS

Project Sales	Multiple contract types	Lead to Quote processes	Quote revisions	Quote to Project processes			
Project planning	WBS	Interactive Gantt and Kanban boards	Co-authoring	Dependencies and constraints	Teams integration	Materials forecasts with Inventory integration	Procurement integration
Resource Management	Skills Management	Requirements and Bookings infrastructure	Configurable filters, and search	Reconciliations for bookings and assignments	Resource request and proposals		
Time, expense entry and approval	Intuitive web and mobile experiences for entry	Options for approvers to edit	Deep Expense management				
Project costing, pricing and Actuals	Configurable dimensions for cost, sales and purchase pricing	Catalog pricing for products and services	Corrections of actuals and integration to Financial system				
Invoicing	Periodic Invoices	Word-based invoice templates	Configurable summarization	Invoice Corrections	Taxes and Exchange rates		
Project Financials	Revenue Recognition	Committed costs	Retainage and Pay-When-Paid				

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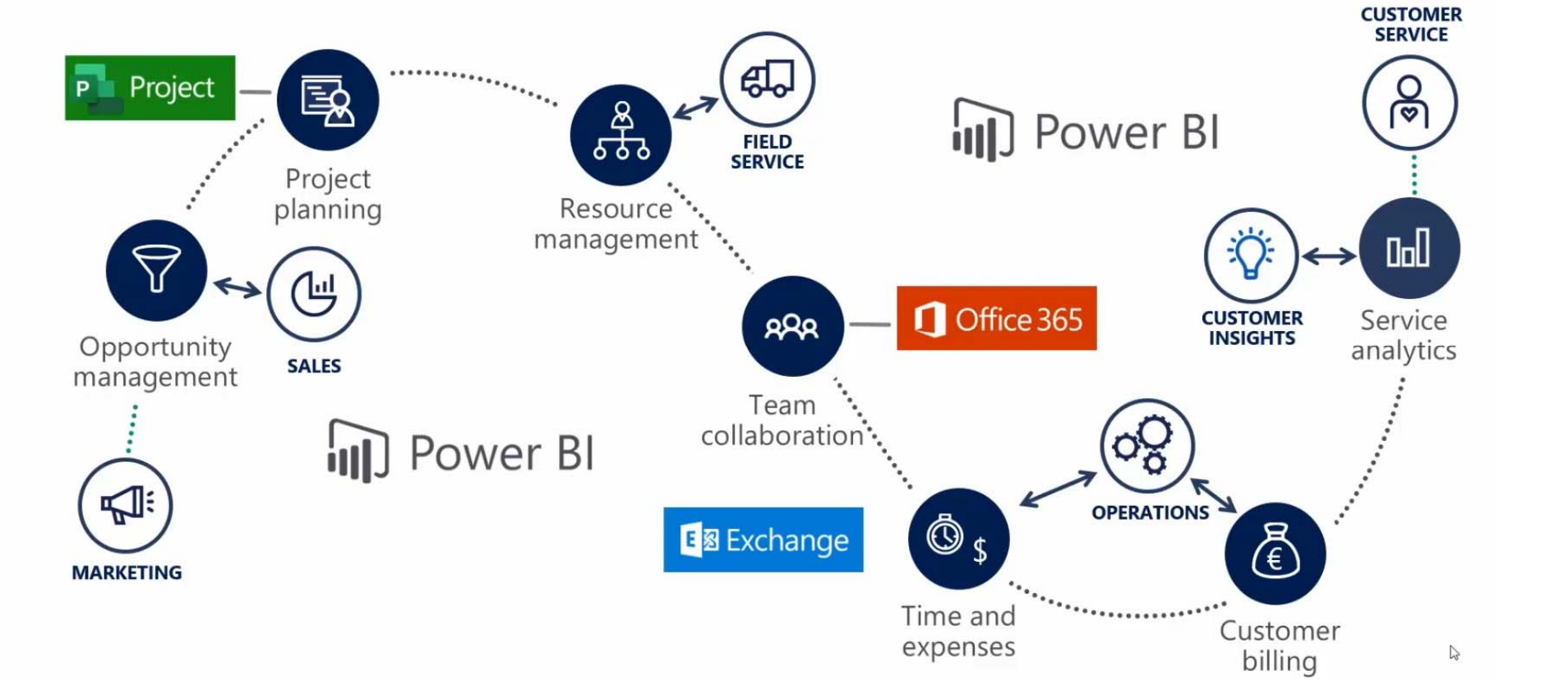
Microsoft’s end to end project capabilities



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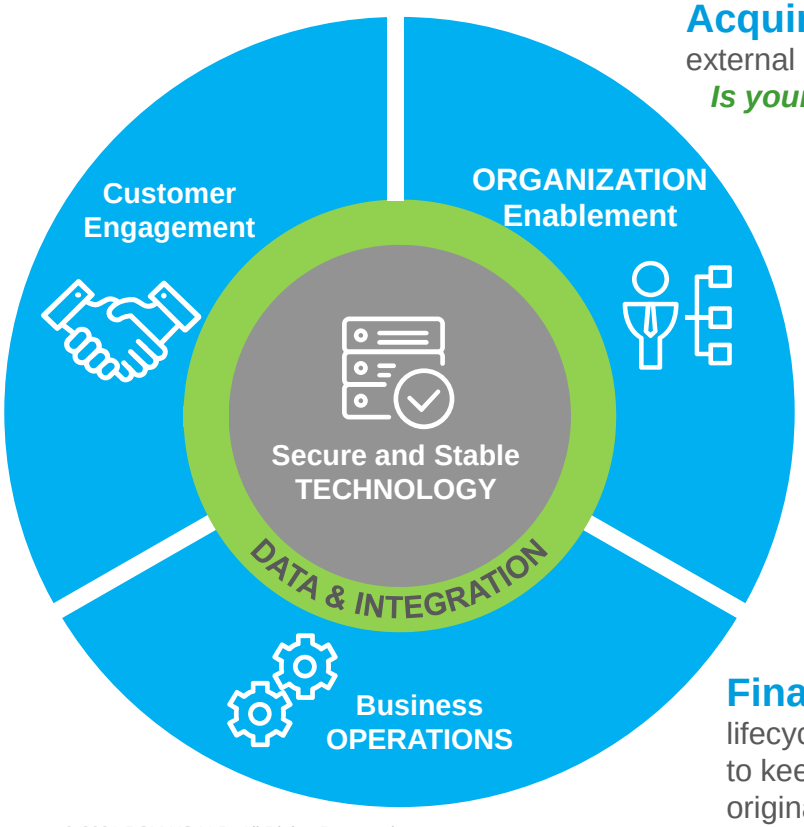
Business topics Dynamics 365 helps address



Acquiring New Clients: How you leverage technology to engage your customers and external stakeholders including how they interact with your business.

Is your customer engagement powered by mobile, social, analytics for personalization?

Maximizing Efficiency: Using the right technologies and systems to transform how you operate, creating higher levels of efficiency and accuracy in day-to-day activities.

Is your digital approach just about incremental cost savings?

Collaboration: Giving your teams the digital tools, capabilities and culture to be more effective and increase value contribution on a regular basis.

Are you making the cultural changes necessary for digital?

Analytics: Capturing and using data to create better insights, deliver more personalized experiences and improve decision making.

Are your decisions data driven? Is data at the core of your business?

Financial Management: Good financial management of a project lifecycle, from the scoping and bidding through to delivery and invoice, is critical to keeping track of whether a project is over or underperforming relative to the original bid and the budget allocated.

Are you able to monitor the profitability of your project in real-time?

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Gain a competitive edge

Our unique value

Broad and deep solution—leveraging platform investments, as well as front and back office capabilities
to connect your teams across the project operations lifecycle

Microsoft Project for the web is embedded within Project Operations to improve collaboration, better serve customers, and accelerate project delivery

Real-time business insights across your project and service operations allow you to adapt to demand, focus on the right projects, and drive business model changes

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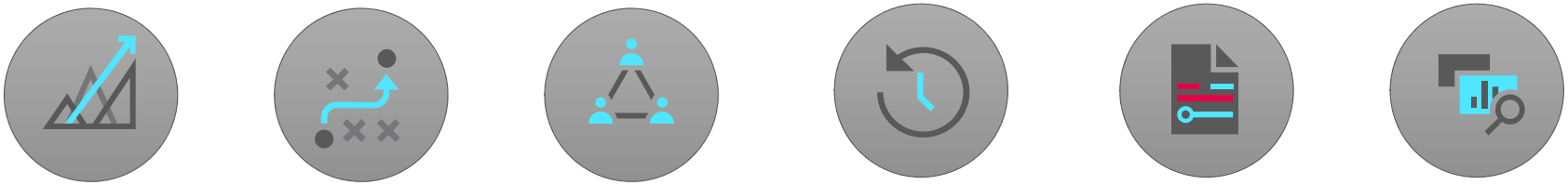
Demonstration



Upcoming webcasts and events

- The power of Power BI: January 26th 1pm ET – https://rsmus.com/events/powerbi-updates.html
- Top 3 reasons to choose Microsoft with RSM GovCon over Deltek: January 27th 1pm ET – https://rsmus.com/events/govcon-deltek.html
- VP of IT retail council, a Cathy Hotka event: January 27th & 28th – Email john.majewski@rsmus.com
- Dynamics 365 CE winter release review: March 10th 1pm ET – https://rsmus.com/events/dynamics-365-2021-series.html

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QUESTIONS AND ANSWERS

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