

Digital Transformation Acceleration

Microsoft Cloud Approach



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On the call



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Digital Transformation Journey

- Digital transformation is an effort by management to leverage the latest information technology capabilities.
 - This is done by improving and integrating business processes within the organization and with outside parties such as suppliers and customers.
- This journey is an evolutionary process, and its pace is dictated by management and driven by several factors such as capabilities, resources, competitive forces and client demands.
- Every organization embarks on this journey, but to what extent and at what pace?



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Digital Transformation Defined

- Digital transformation is the ability for an organization to leverage the latest information technologies in order to achieve capabilities such as:
 - Establishing highly integrated operational processes
 - Enabling collaboration within the organization
 - Enabling customer interaction with our systems
 - Integrating within the supply chain network
 - Improving management decision making capabilities
 - Viewing data as an organizational asset
 - Developing capabilities to maximize data asset values
 - Establishing proper safeguards for data assets



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Digital Maturity Model

- **MANUAL**

- Many paper based processes in place, difficult to share and normalize information between departments

- **AUTOMATED**

- Many tasks automated but not efficient, existence of silos, Excel sheets and workarounds

- **DIGITAL**

- Integrated processes internally and externally, leverage silent commerce principles, human intervention for value added activities



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Digital Enablement Deployment Models

- On-Premise
 - Traditional in nature
 - Leveraging existing capabilities
- Cloud Models
 - Public versus Private
 - SaaS
 - PaaS
 - IaaS
- Hybrid
 - Combination of Hybrid and Cloud
 - CapEx versus OpEx



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Cloud Deployment Challenges

- Usually starts with one point solution and then mushrooms out of control to several applications/services.
- Could be planned/selected with minimal IT oversight, resulting in “Shadow IT” phenomenon.
- Integration and managing APIs between applications becomes a challenge.
- Might lead to addition of middleware applications, that will also need to be managed.
- Differences in field definitions and terminologies result in less than desirable process standardizations.
- Quality of cloud provider will be key in ensuring system availability and security considerations.



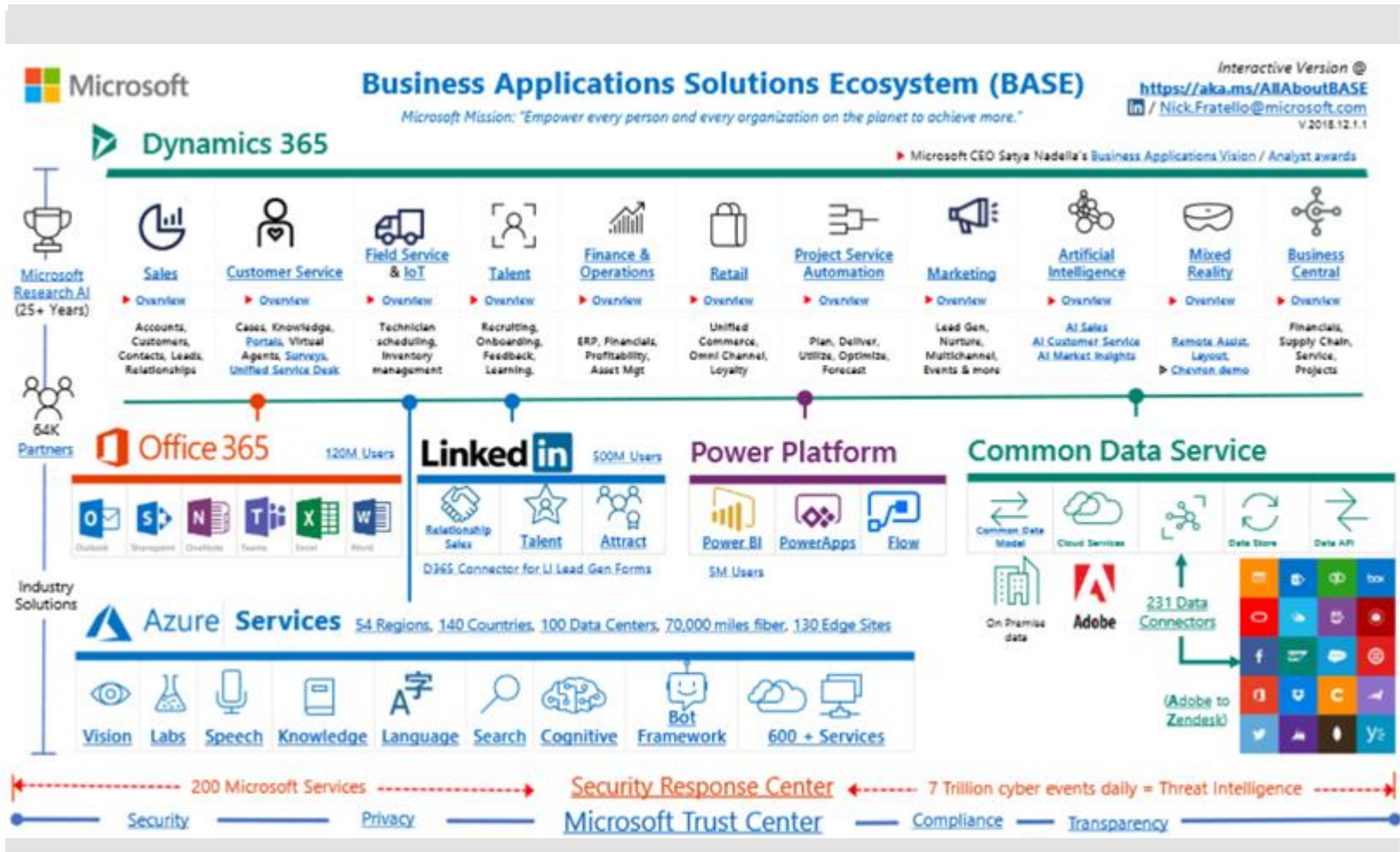
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Middle Market Leaders



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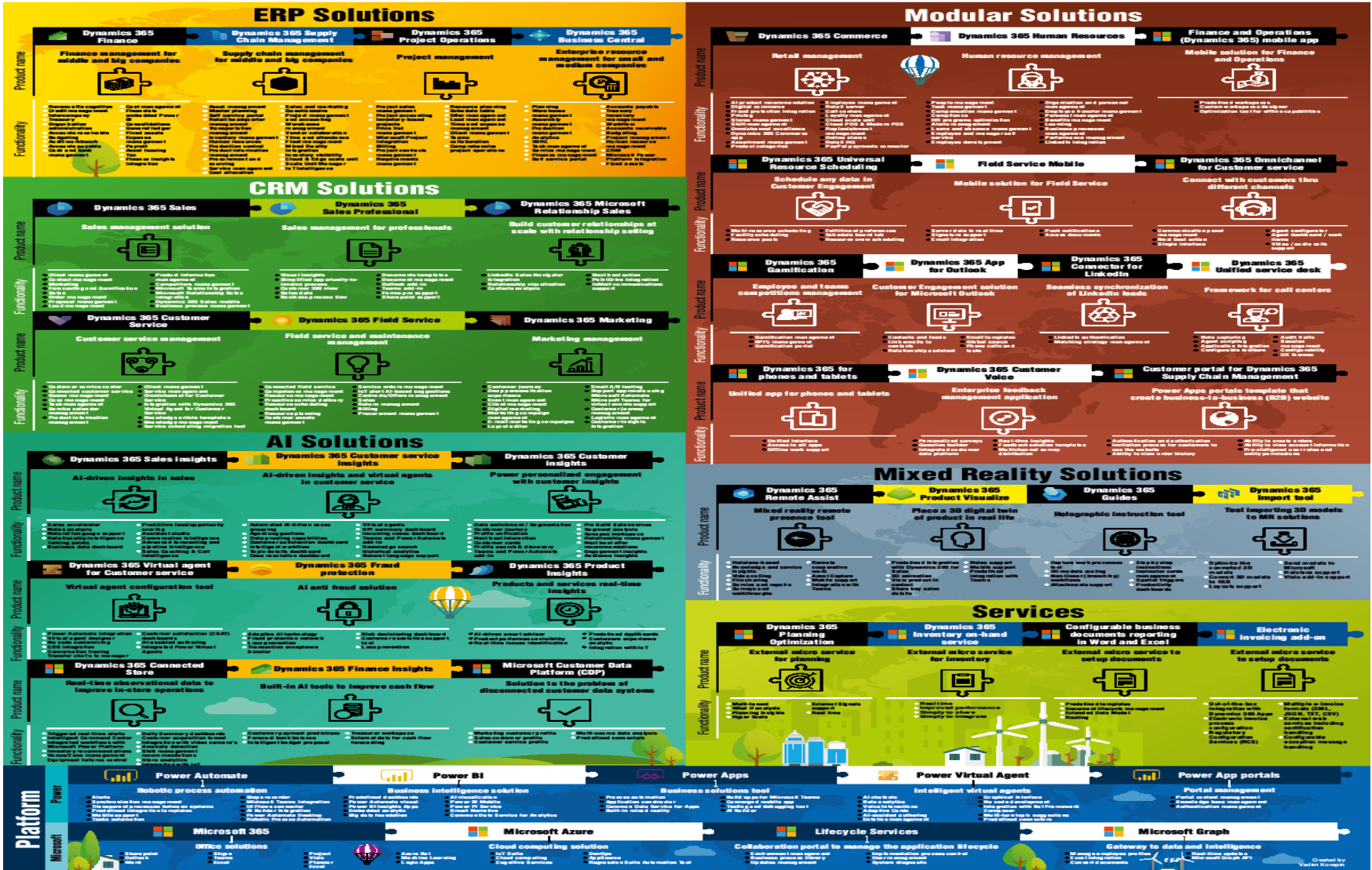
Platform Case Study – Microsoft Cloud





MICROSOFT DYNAMICS ECOSYSTEM MAP

October 2020



Digital Transformation Enablement

- Financial and ERP systems are enablers of Digital Transformation as these updated systems form the backbone of an organization's **digital nervous system**.
- Executives would like to achieve as much process automation as possible leveraging emerging technologies.
- As data is being captured through various stages of processes, organizations are striving to leverage their data assets to achieve improved decision making capabilities.
- Executives in conjunction with IT are also asked to provide an increased level of cyber security, information privacy and digital protection to the organization.



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Digitally Transformed Finance/ERP

- Efficient quote to cash processes
- Process workflow/approval automation
- Business alert and notification features
- Ease of defining lookups, queries and reports
- Analytics and management dashboards
- Integrated paperless and document management
- Employee, customer and supplier self service capabilities
- Support for access across devices (i.e. mobile)
- Ease of integration with other “point” applications
- Cyber and information security readiness



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ERP Platform



Dynamics 365 - Connect people, processes, and systems

Reimagine productivity with Dynamics 365 and Office 365

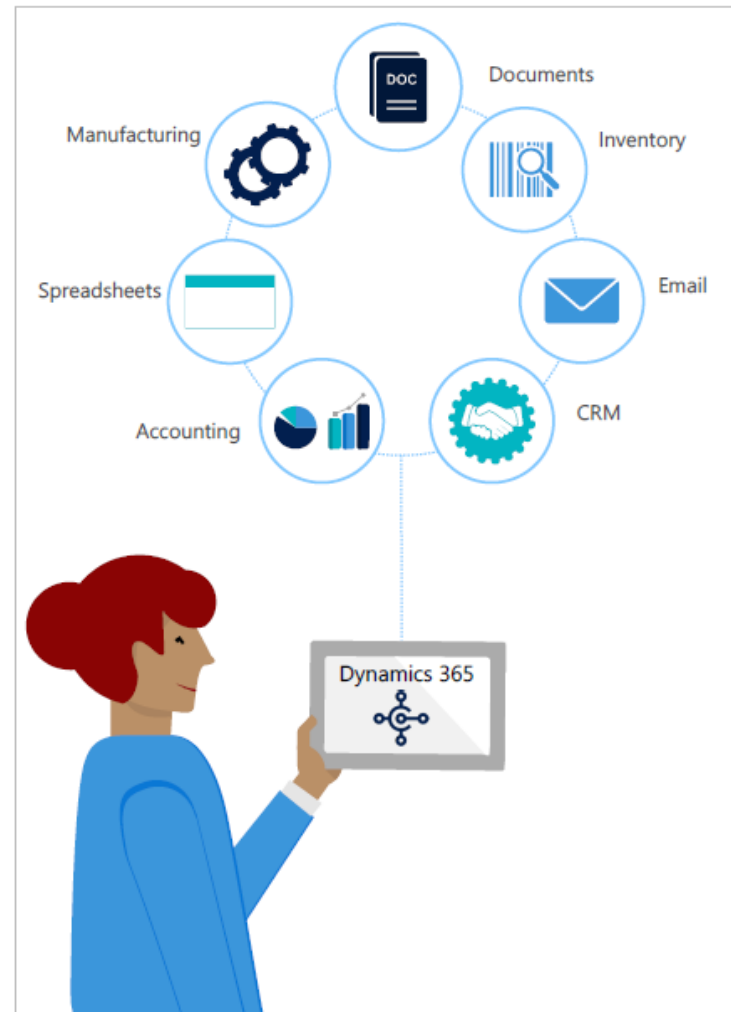
Microsoft brings the worlds of business processes and personal productivity together, connecting your people, processes, and systems like never before.

Right now, your employees might be the only common link between your business systems and the email, spreadsheet, and word processing tools you use every day. This means they waste a lot of time flipping between apps or cutting and pasting, which can lead to data entry errors. Connected business solutions from Microsoft help pull everything together so your people don't have to.

Together, Microsoft Dynamics 365 Business Central and Office 365 help you:

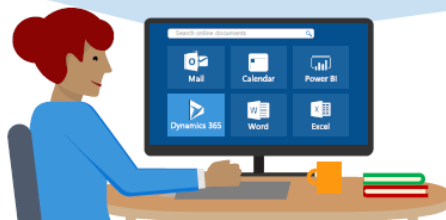
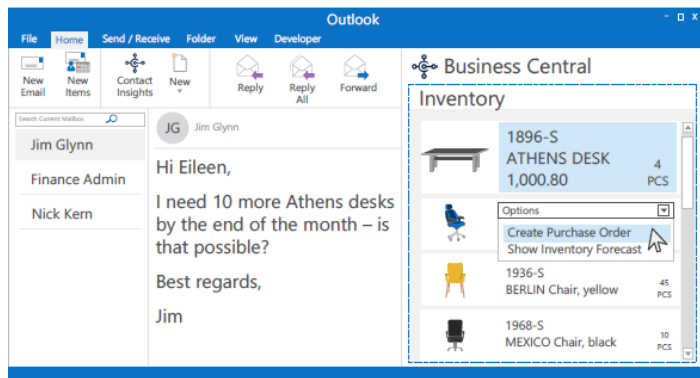
- Drive productivity by reducing time spent switching between stand-alone apps
- Foster collaboration and communication by breaking down internal silos and broadening visibility across the organization
- Accelerate user adoption and lower training time with a seamless user experience

Let's take a look at some scenarios where Dynamics 365 and Office 365 work together to make your people more productive and your business more efficient.



Work where business takes you

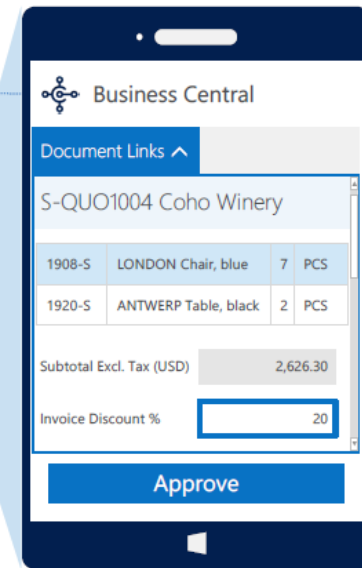
As a business owner, imagine you receive an email from a high-priority customer who urgently needs an order delivered in a short timeframe. With Dynamics 365 Business Central, you can find the information you need and act on it without searching disparate systems or coordinating with other departments. Without leaving your inbox, you check inventory and discover that you don't have enough stock on hand to fulfill the order. In the same interface, you create and send both a purchase order to the vendor and a quote to your customer, moving on to your next task within minutes.



Access inventory information and create purchase orders, quotes and invoices right from Microsoft Outlook

Dynamics 365 workflows also help you secure processes and work on the go. Suppose you are out of the office and an email alerts you that a sales quote has exceeded your established 10% maximum discount. Right from your mobile inbox, you quickly review the quote and check the customer's order history, account status, and credit limit. You make an informed decision to approve the discount, which automatically updates the quote and notifies the sales rep that it's ready to be sent to the customer.

Edit and approve quotes, orders and invoices on any device



With Dynamics 365 and Office 365 working together, you can take quick action right from your email – allowing you to spend more time managing your business and connecting with customers.

Improve customer interactions

You know how critical it is to keep your sales team connected in the office and on the go. Dynamics 365 and Office 365 simplifies and automates daily tasks to keep your sales team focused on managing sales.

Your sales rep receives an email from a customer requesting a quote on some items. The system recognizes the sender, enabling him to easily pull up customer card within Outlook. From this dashboard, he reviews the account – including the customer's existing quotes, ongoing orders, and sales history. As he's creating the quote, customer and product information auto-populate, helping him get it done faster.

While he was sending the sales quote, a note hit his inbox from a potential customer he met at a recent event. The system recognizes that their email address is not in the customer database, and prompts him to add them. Without leaving Outlook, he creates their profile in the Dynamics 365 app.

This kind of automation reduces time spent on administrative tasks, allowing your sales team to quickly respond to inquiries and ultimately improve customer interactions.

Use Microsoft Word to modify quote and invoice templates in Dynamics



Sales Quote
S-QUO1004

Coho Winery
Jim Glynn
192 Market Square
Atlanta, GA 31772
USA

Ship to Address
Coho Winery
2 Lewis Road
Atlanta, GA 31772
USA

CONUS USA, INC.
7122 South Ashford St
Westminster
Atlanta, GA 31772

Document Date: November 7, 2016
Payment Terms: 1 Month/2% 8 days
Shipment Method: Express

Item	Description	Quantity	Unit	Unit price	Line Amount
1908-S	LONDON Swivel Chair, Blue	7	Piece	190.10	1,330.70
1920-S	JANVERP Conference Table	2	Piece	647.80	1,295.60
Subtotal					2,626.30
Invoice Discount					0.0
Total Tax					0.00
Total USD					2,626.30

Amount Subjected to Sales Tax: 0.00
Amount Exempt from Sales Tax: 2,626.30

Set up or update customers and vendors in Dynamics 365 from Outlook

1
5



Outlook

File Home Send / Receive Folder View Developer

New Email New Items Contact Insights New Reply Reply All Forward

Search Customer Mailbox

Sally McArthur

Peter Frame

Ellen Smith

SM Sally McArthur

Hi Benjamin,
Nice meeting you last week.
Could you send me more information about your office chairs?
Best regards,
Sally McArthur

Business Central

Do you want to add a new contact? [Edit](#) [Refresh](#)

The sender of this email is not among your contacts.

[Add Sally McArthur as a contact](#)

[View existing contacts](#)

Robotic Process Automation (RPA)

- Many organizations have developed a patchwork of applications, with data being entered in multiple places and requests travelling via various tools ranging from manual reports and forms to emails and spreadsheets from one system to another in different ways.
- Robotic Process Automation, or as commonly referred to as RPA, democratizes automation through integration of all applications using a unified set of tools to eliminate non-value added activities while at the same time increase overall process efficiency, quality and scalability levels.
- RPA is a digital transformation realization tool enabling managers to achieve “hyper automation”, by having the ability to quickly identify business process improvement opportunities and use available tools to achieve high ROIs in a rapid and quantifiable fashion.



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Robotic Process Automation Examples

- Accounting & Finance – Payables and receivables processes. Automated reconciliation and financial close activities.
- Operations – Customer and vendor management, inventory automation, cycle counts, order fulfillment, quality tracking, job/project setups, project budget monitoring.
- Sales & Marketing – Campaign and outreach email management, brochure and content sharing processes, CRM automation.
- H/R – Employee forms, onboarding and termination processes, benefits management support processes.
- Executive Management – Business analysis, monitoring and reporting. Risk management and regulatory compliance support.



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Microsoft Power Platform



Microsoft Power Automate

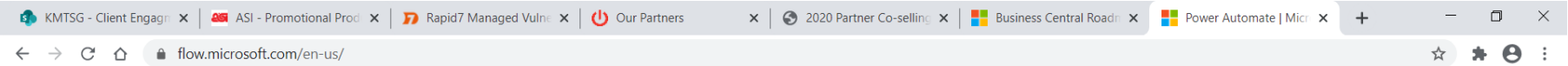
The screenshot displays the Microsoft Power Automate interface. The main window shows a flow diagram titled "Employee Onboarding Workflow Diagram.vsdz - Visio Professional". The flow starts with a trigger "Item added" in the HR department, followed by an action "Get item details", and then "Send an email to HR". A decision diamond "Check department" is shown with a red 'X' and "None" selected. A confirmation dialog box is overlaid on the flow, stating "Your flow was created" and "Your flow was successfully created! To make changes to it, go to Microsoft Flow." The dialog has a "Done" button. On the right, the "Triggers and Actions" pane is visible, showing a search bar and a list of triggers and actions. The "Shape Data - Task..." pane is also open, showing properties for the selected task.

Categories	
Documentation	
LoopType	None
TaskType	None
IsForCompensation	FALSE
BoundaryType	Default
Function	Techn
Connector	Share
Trigger	When

Filter by Connectors	See More	
SharePoint	Office 365 Outlook	Twitter

Trigger(169)	Action(310)
Office 365 Outlook - When a new email arrives	
Office 365 Outlook - When a new email arrives (webhook)	
Office 365 Outlook - When an email is flagged	
SharePoint - When a file is created (properties only)	
SharePoint - When a file is created in a folder	

Microsoft Power Automate

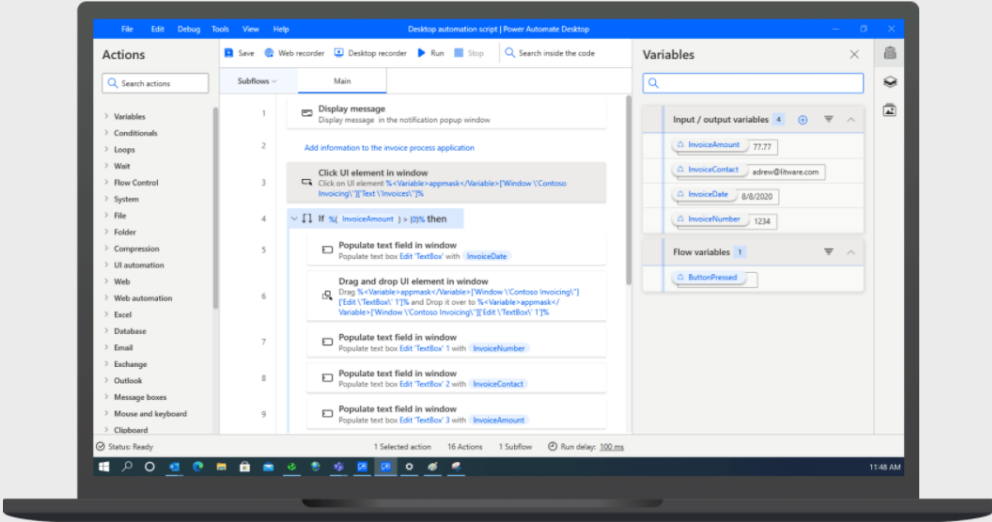


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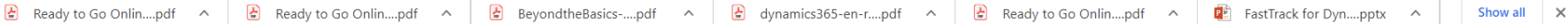


Empower anyone to automate any task at any time with RPA

Automate mundane, rules-based tasks with point-and-click simplicity—whether the app is old or new, on-premises or in the cloud—with RPA in Power Automate.

[Learn more >](#)

Contact us



Microsoft Power Automate

The screenshot displays the Microsoft Power Automate templates page in a browser. The browser's address bar shows the URL `flow.microsoft.com/en-us/templates/`. The page header includes the Microsoft logo, the text "Power Automate", and navigation links for "Templates", "Connectors", and "Learn". A search bar is present with the text "Search templates ...". On the right side of the header, there are links for "Sign in", "Try free", and "Buy now".

The main content area features a search bar with the text "Search templates ..." and a dropdown menu for sorting, currently set to "Sorted by popularity". Below this, there are navigation tabs for various categories: "All flows", "Featured", "Remote work", "Approval", "Button", "Data collection", "Visio", "Email", "Events and calendar", "Mobile", "Notifications", and "Productivity".

The templates are displayed in a grid of 12 cards. Each card contains an icon representing the template's function, a title, the creator "By Microsoft", and the number of users who have used the template. The templates are:

- Save Office 365 email attachments to OneDrive for Business** (Automated, 642425 users)
- Send myself a reminder in 10 minutes** (Instant, 381550 users)
- Get a push notification when you receive an email from your boss** (Automated, 358940 users)
- Power Apps button** (Instant, 295729 users)
- Get today's weather forecast for my current location** (Instant, 289632 users)
- Start approval when a new item is added** (Automated, 279086 users)
- Send a customized email when a new SharePoint list item is added** (Automated, 277639 users)
- Send a customized email when a new file is added** (Automated, 272641 users)

The browser's taskbar at the bottom shows several open PDF files: "Ready to Go Onlin....pdf", "BeyondtheBasics-....pdf", "dynamics365-en-r....pdf", and "FastTrack for Dyn....pptx". A "Show all" button is visible on the right side of the taskbar.

Analytics/Management Dashboards

- Dashboards are enablement tools of business performance management in today's modern organizations.
- Dashboards have become popular due to recent advances in cloud and open interface technologies.
- Dashboards are used to report on KPIs in an effective manner in order enable management to keep everyone focused on achieving tangible results.
- Dashboards, when implemented properly, improve communication and accountability throughout the organization.



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Examples

- Opportunity tracking & management
- Sales performance & leaderboard
- Order fulfillment management
- Inventory & supply chain management
- Operational/outcome monitoring
- Project tracking & costing
- Workforce planning & utilization
- Product & customer segmentation analysis
- Financial metrics & forecasting



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Microsoft Analytics



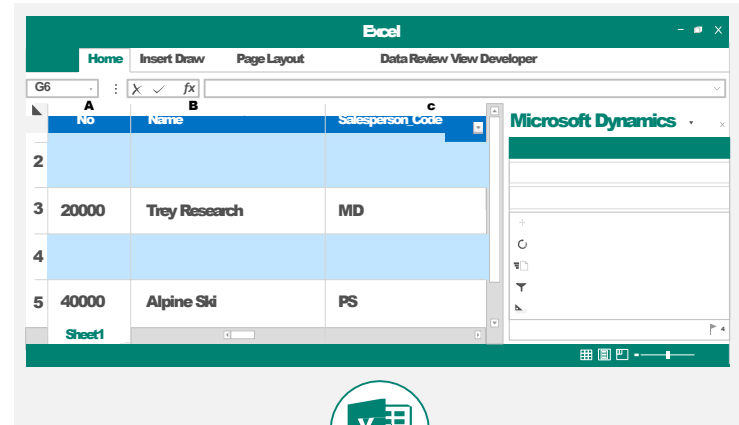
Simplify reporting and make better decisions

Your accountants run a crucial piece of the business. Dynamics 365 make an accountant's day easier by simplifying reporting, streamlining month-end close, and reducing data entry errors.

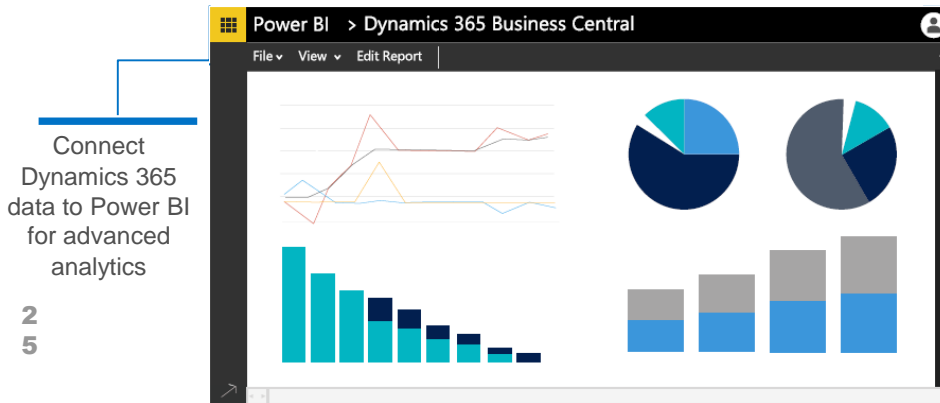
Her day starts in the Dynamics 365 app, where she is preparing the monthly P&L statement. She needs to edit multiple invoices at once, so she opens the invoice list in Microsoft Excel. In a matter of minutes, she adds a new batch of invoices and updates the status of several others. With just one click, she publishes the data back to the Dynamics 365 app, where it's automatically refreshed.

Wanting a deeper analysis of the month's revenue, she switches to Microsoft Power BI. There she has multiple ways to analyze Dynamics 365 data, including the revenue information she just updated. Through rich visuals and custom dashboards, she gains insights she couldn't get from standard reports.

With Dynamics 365 Business Central, you get an end-to-end view of your business and built-in intelligence that helps you make more informed decisions.



Refresh data in Excel without having to return to the financial system



Microsoft Power BI



Transformation Accelerators

- Recent Events – Realization that we need the ability to work from anywhere at anytime with ease and security.
- Industry Realities – Competitive pressures and customer expectations for product and service pricing and delivery capabilities.
- Technological Capabilities – Outdated IT systems, applications, tools and related resources.
- Managerial Priorities – Executive leadership’s view on priorities and allocation of needed resources for growth and profitability.



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Transformation Rewards

- Operational Agility – Ability to adjust to changing conditions in a rapid response manner.
- Lowered Transaction Costs – Tightly integrated systems offer increased process efficiencies.
- Improved Decision Making – Data becomes more of a digital asset; easier to slice and dice/dashboards.
- Increased Customer Loyalty – Customers across generations find ways suitable for them to conduct commerce.
- Increased Scalability – Company can easily add or remove users and new products/services/markets.
- Improved Cyber Resiliency – Reducing risks through leveraging cloud provider security expertise.



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Concluding Comments

- Path to digital transformation varies from one organization to another.
 - One size does not fit all!
 - Simpler is better
- Arrange a “complimentary” consult/discussion of business plans, needs, high level systems and processes to determine a best fit digital transformation approach.



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Thank You for Attending!



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