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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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- Technological Capabilities – Outdated IT systems, applications, tools and related resources.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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Middle Market Leaders

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Microsoft Business Application Solution Ecosystem

Microsoft's Business Applications are built on **Azure**, using a **Common Data Model** that unifies data in **Dataverse. Power Platform** is the low code extensibility solution for Microsoft's **Office 365**, **Teams**, **Dynamics 365** business applications (CRM & ERP) and integrates with **400+ services.**

64K+ Partners

Analyst Recognition:
1) Analytics & BI
2) API Management (Full Lifecycle)
3) Cloud DBMS
4) Cloud Infrastructure
5) Content Services Platforms
6) CRM Customer Engagement
7) CRM Customer Service Solutions
8) CRM Lead Management
9) CRM Sales Force Automation
10) Data Integration Tools
11) Data Science & ML
12) ERP (Cloud)
13) Iot (Industrial)
14) Low-Code App Platforms
15) Meeting Solutions
16) Robotic Process Automation (RPA)
17) Security: Access Management
18) Security: Cloud Access Security Brokers
19) Security: Endpoint Protection
20) Security: Ent. Information Archiving
21) Security: Unified Endpoint Management

Industry Solutions

1 AI Platform & MS Research (25+ years)

- 18,000+ Patents
- Human Parity Machine Learning
- Cognitive Services
- Decision, Language, Speech, Vision

2 LinkedIn

- 720M+ Professionals
- Sales Navigator

3 Microsoft 365

135M+ Users

- Identity
- Outlook
- Teams 115M+ Daily Active Users
- Office
- Sharepoint
- OneDrive
- Excel

4 Dynamics 365

- Marketing
- Sales
- Customer Service
- Virtual Agents
- Field Service
- Product Visualize
- Remote Assist
- Commerce
- Connected Store
- Fraud Protection
- Supply Chain
- Guides
- HR
- Finance
- Project Operations
- Business Central

5 Power Platform

- Power BI 7M Users
- Power Apps
- Power Automate
- Power Virtual Agents
- Power Portals

Customer Data Platform (CDP)

- Customer Insights
- Customer Voice

6 Dataverse

- Dataverse for Teams
- Common Data Model
- Cloud Services APIs
- 400+ Connectors

SAP salesforce

7 Azure (600+ Services)

- AI & ML
- Analytics
- Blockchain
- Compute
- Containers
- Databases
- Dev Tools
- DevOps
- IoT
- Media
- Networking
- Security
- Storage

200 Microsoft Services

Microsoft Security Response Center

7 Trillion cyber events daily = Threat Intelligence

Security — Microsoft Trust Center — Compliance — Transparency

nickfratello V.2020.02

ERP Platform

Microsoft Dynamics 365

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Dynamics 365 - Connect people, processes, and systems

Reimagine productivity with Dynamics 365 and Office 365

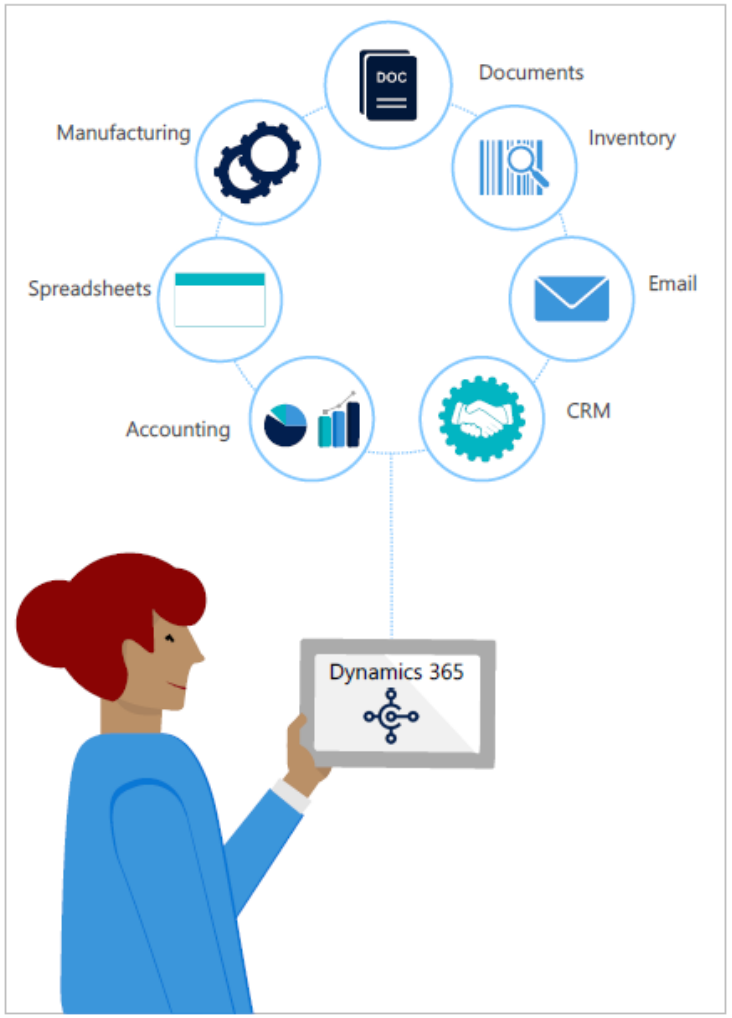
Microsoft brings the worlds of business processes and personal productivity together, connecting your people, processes, and systems like never before.

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.



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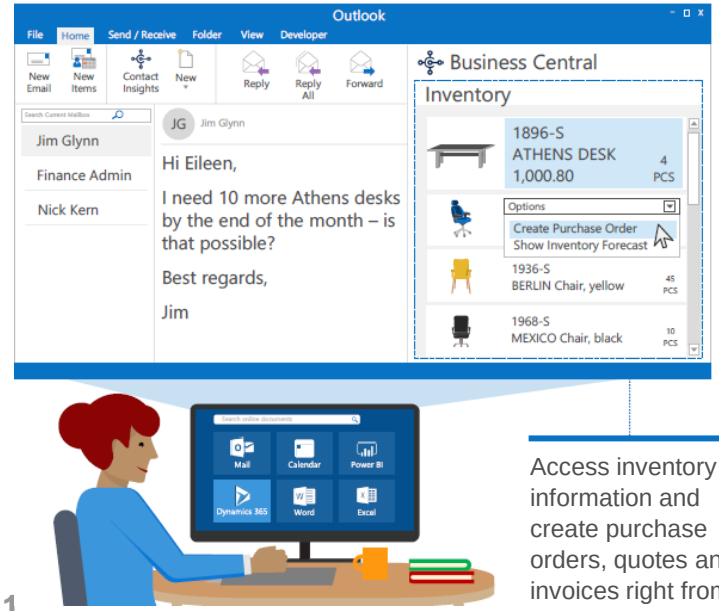
Microsoft

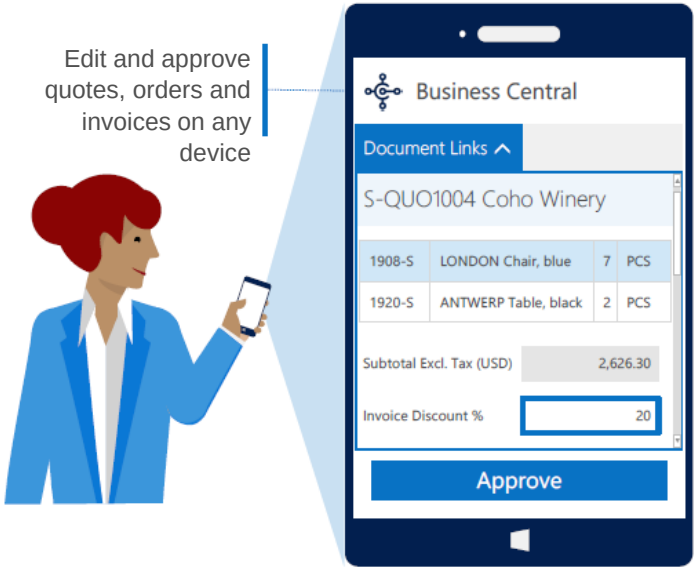
Work where business takes you

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.



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.

Microsoft

Improve customer interactions

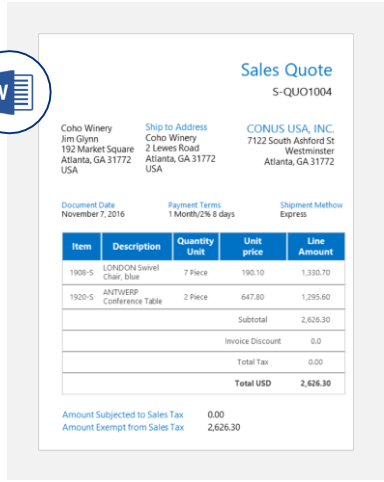
You know how critical it is to keep your sales team connected in the office and on the go. Dynamics 365 and Office 365 simplifies and automates daily tasks to keep your sales team focused on managing sales.

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.

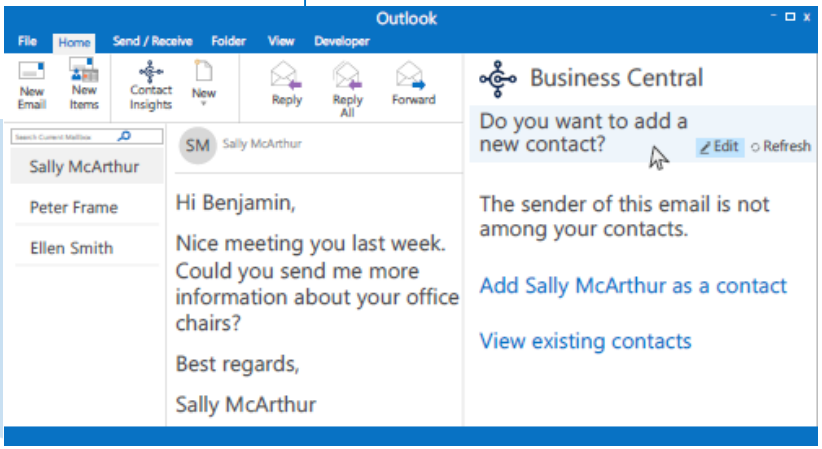
While he was sending the sales quote, a note hit his inbox from a potential customer he met at a recent event. The system recognizes that their email address is not in the customer database, and prompts him to add them. Without leaving Outlook, he creates their profile in the Dynamics 365 app.

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

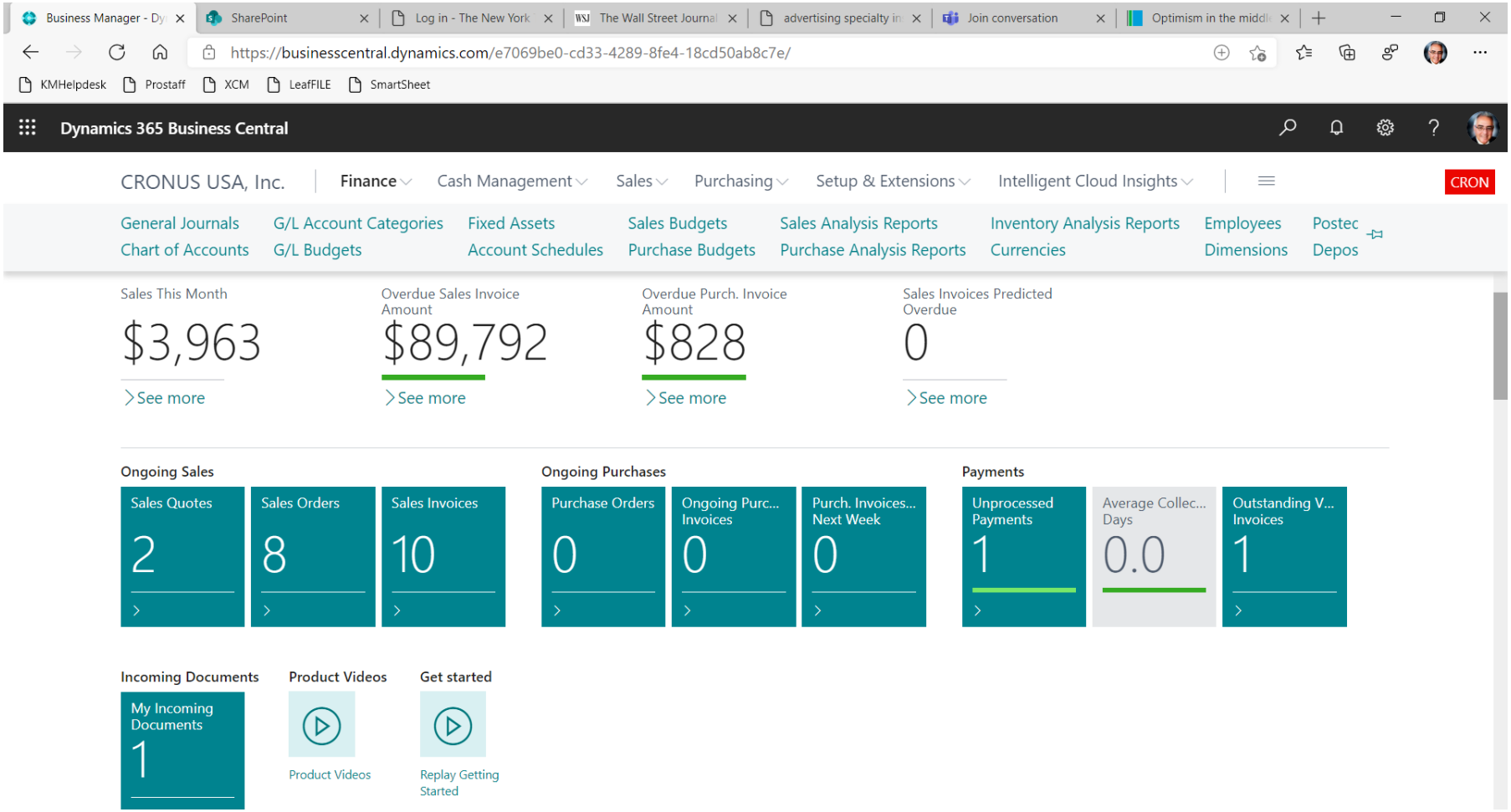


Set up or update customers and vendors in Dynamics 365 from Outlook



Microsoft

Built in Workbench



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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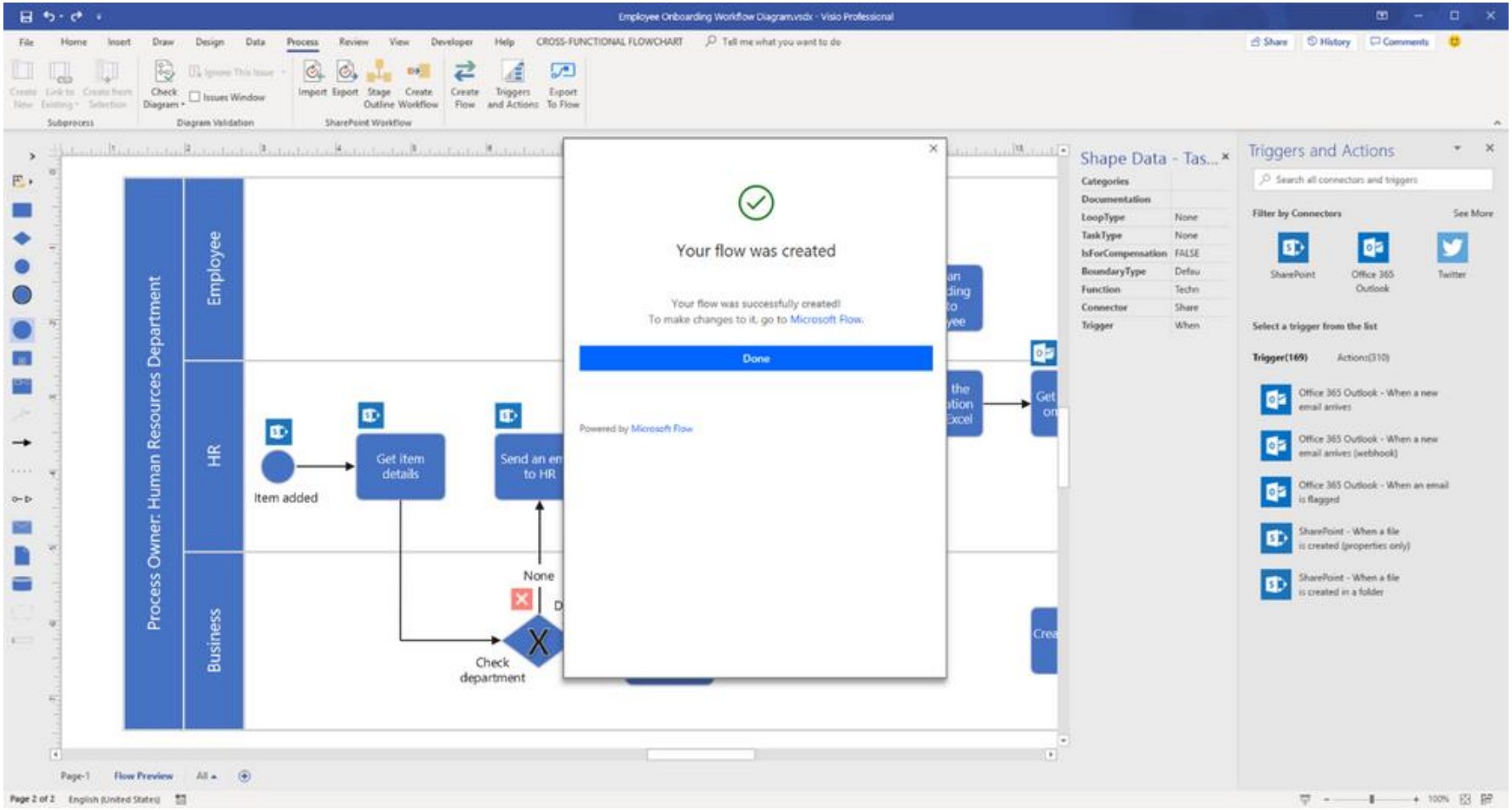
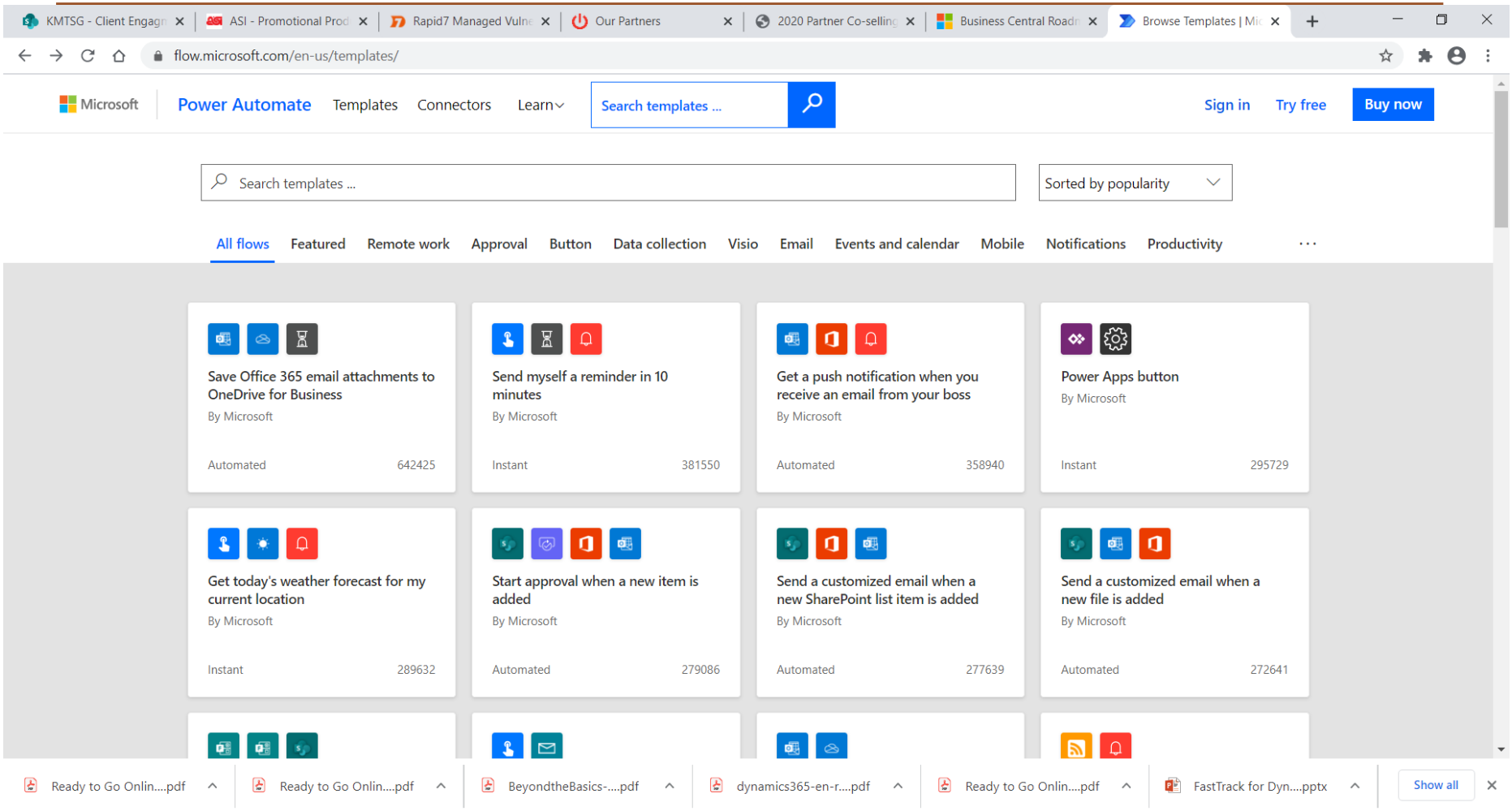
Microsoft Power Platform

Microsoft Power Automate



Microsoft Power Automate



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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Microsoft Analytics

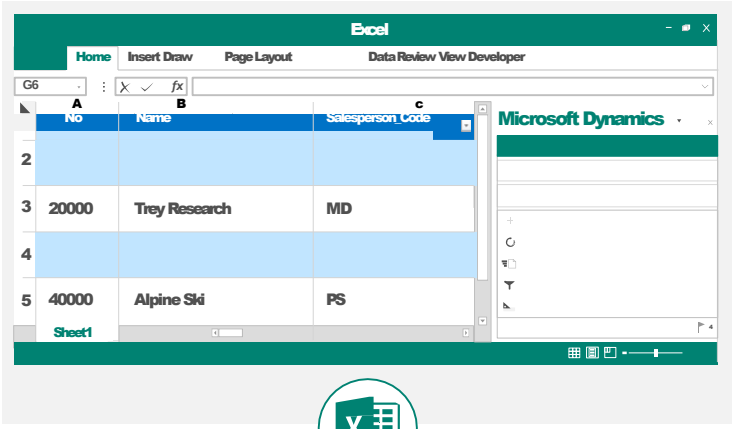
Simplify reporting and make better decisions

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.

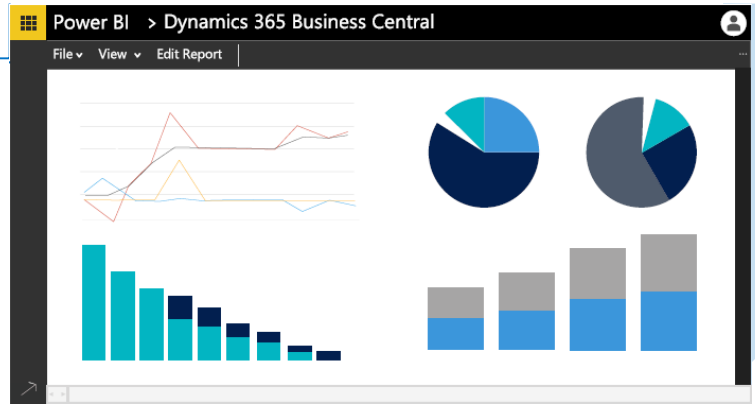
Wanting a deeper analysis of the month's revenue, she switches to Microsoft Power BI. There she has multiple ways to analyze Dynamics 365 data, including the revenue information she just updated. Through rich visuals and custom dashboards, she gains insights she couldn't get from standard reports.

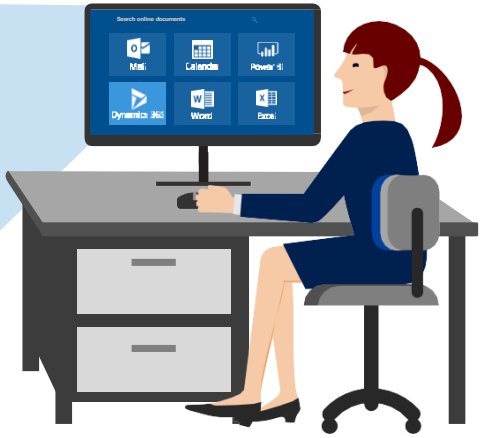
With Dynamics 365 Business Central, you get an end-to-end view of your business and built-in intelligence that helps you make more informed decisions.



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

Connect Dynamics 365 data to Power BI for advanced analytics





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Microsoft

Microsoft Power BI

Case Study

Payments Made Easy

+

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Steven Wolfson- Director of Sales
Chris Robinson- Account Manager

Microsoft

Simplifying payments since 2004

- ✓ $5 billion processed every year
- ✓ Over 10,000 users
- ✓ Over 50 software integrations
- ✓ 14 years in business

AS SEEN IN

Forbes · Entrepreneur · NewsWatch · AMC · PYMNTS.com · The Huffington Post

- Payment integrations
- Payment gateway
- In-house development
- In-house support

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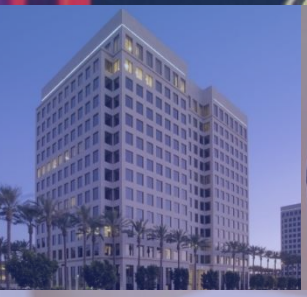
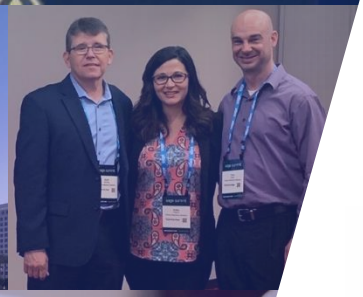
Microsoft





A trusted name in the industry

Inc. 5000 2017

Inc. 5000 2018

Inc. 5000 2019

2017 23RD FASTEST-GROWING MIDSIZE BUSINESS ORANGE COUNTY BUSINESS JOURNAL

2018 21ST FASTEST-GROWING MIDSIZE BUSINESS ORANGE COUNTY BUSINESS JOURNAL

CNP AWARDS Best Payment Service Provider Judges Choice 2018

CNP AWARDS Best Payment Service Provider Customer Choice 2018

CNP AWARDS Best Payment Service Provider Judges Choice 2019

CNP AWARDS Best Payment Service Provider Customer Choice 2019

BBB ACCREDITED BUSINESS A+

2018 STEVIE SILVER WINNER AMERICAN BUSINESS AWARDS

SILVER 2019 STEVIE WINNER AMERICAN BUSINESS AWARDS

Great User Experience 2018 Award Awarded by FinancesOnline

Rising Star 2018 Award Awarded by FinancesOnline

CATEGORY LEADER TOP 10 Q4 2017 GetApp

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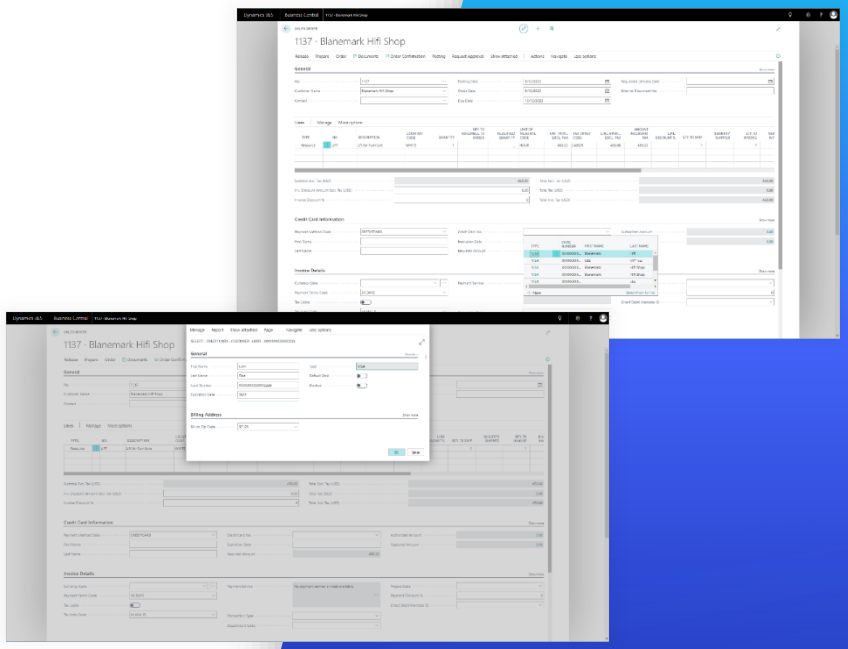
Payment integration

How most businesses run payments

- ✓ **They** leave Dynamics to use an external system
- ✓ **They** re-enter the amount and process the card
- ✓ **They** return to Dynamics from their external system
- ✓ **They** manually record the payment in Dynamics

How EBizCharge helps your clients

- ✓ **They** process the card in Dynamics (no data re-entry)
- ✓ EBizCharge automatically records the payment and updates Dynamics



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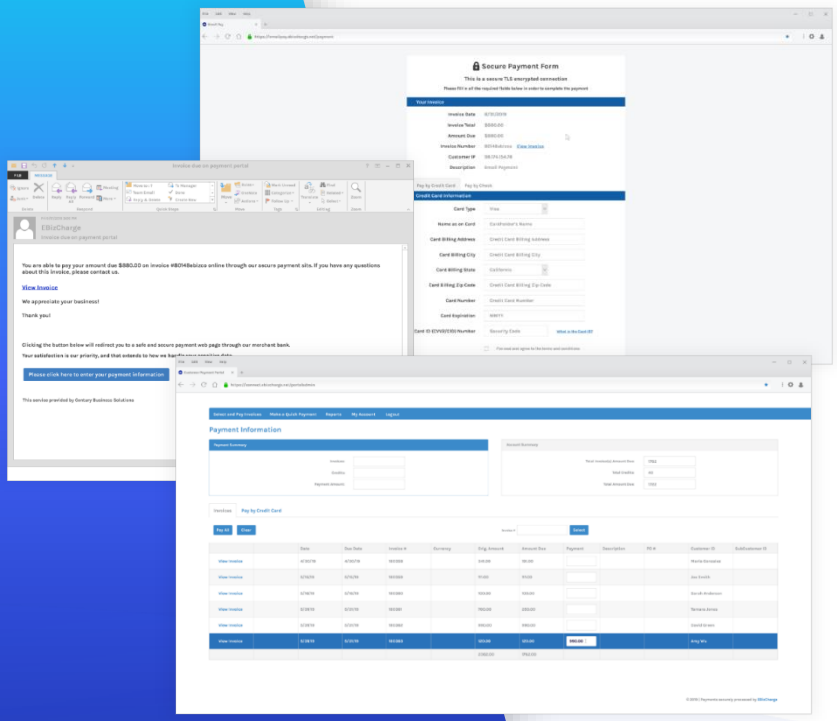

EBizCharge Merchant Benefits

Merchants who use EBizCharge benefit:

- ✓ Improve Cash Flow by reducing day's sales outstanding
- ✓ Securely process payments within Dynamics ERP
- ✓ Drive new employee productivity
- ✓ Save money on credit card processing fees

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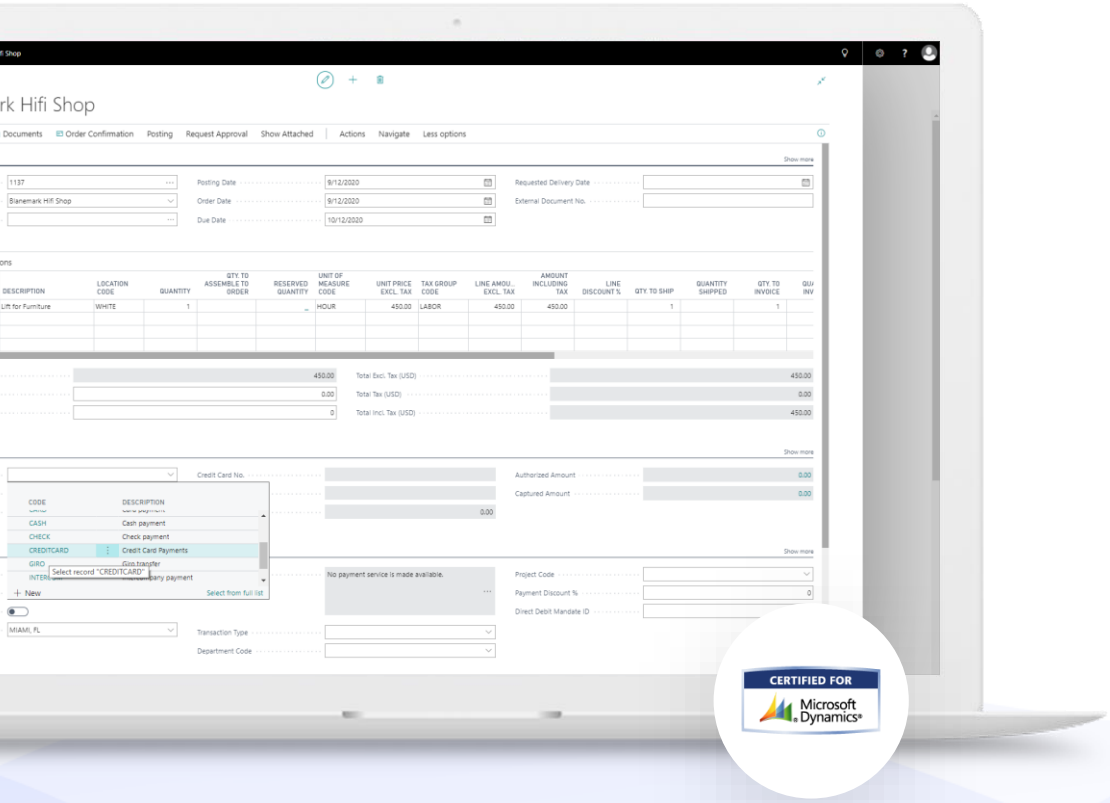
Microsoft

Microsoft Dynamics + EBizCharge



Clients save time managing their payments in one place

- ✓ Accept credit, debit, ACH, and EMV payments directly inside:
  - Customer
  - Sales
  - Accounts Receivable
  - Credit Memo
- ✓ Automatically applies payments back to invoices and updates the balance due

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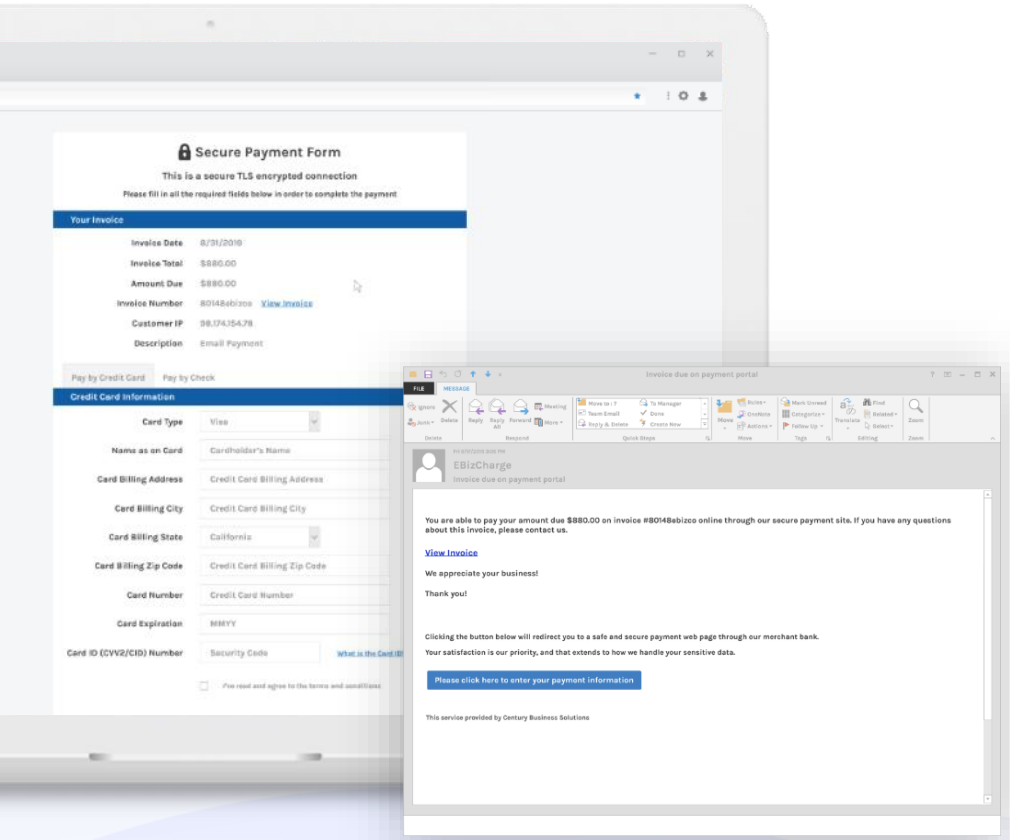

Email pay

Customers securely pay invoices right from their inbox

- ✓ Clients can email invoices to customers right from Dynamics
- ✓ Customers click on a link and pay their invoices through a secure web form
- ✓ No need to log in
- ✓ Automatically applies paid invoices back to Dynamics

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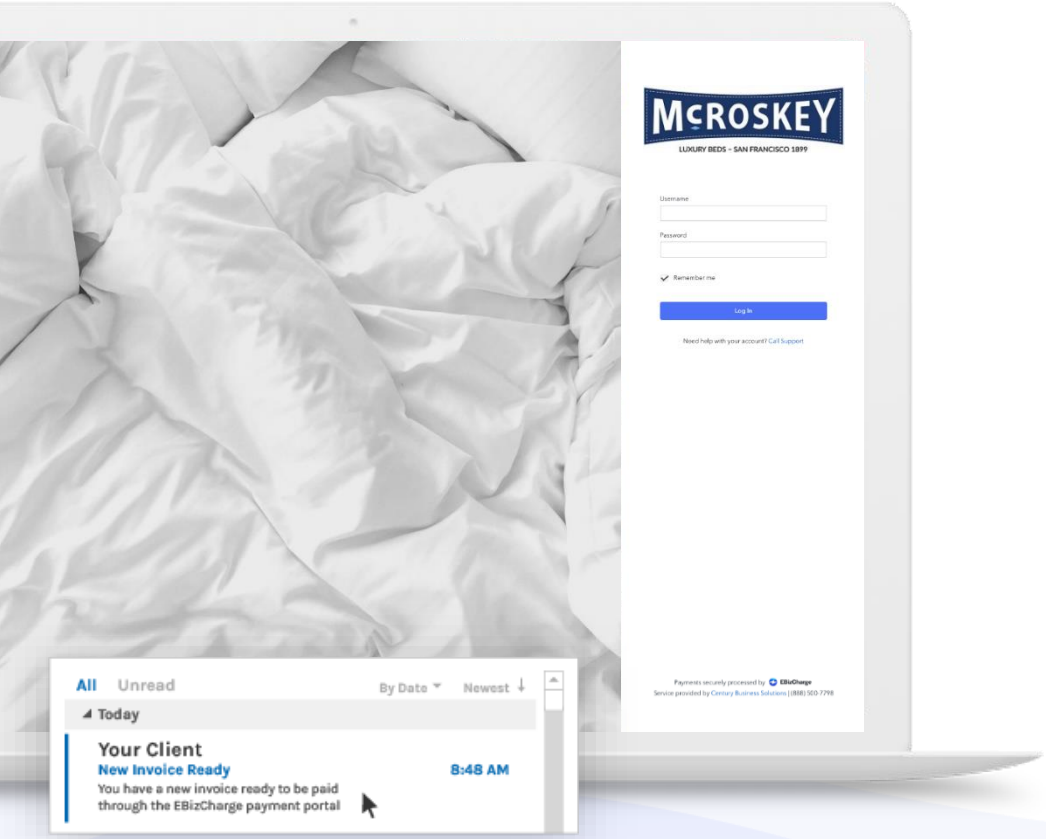

Customer payment portal

Allow customers to pay invoices online

- ✓ Custom branded homepage, including company logo and image
- ✓ Payments and invoices seamlessly sync with Dynamics
- ✓ Automatically sends payment notifications via email to customers

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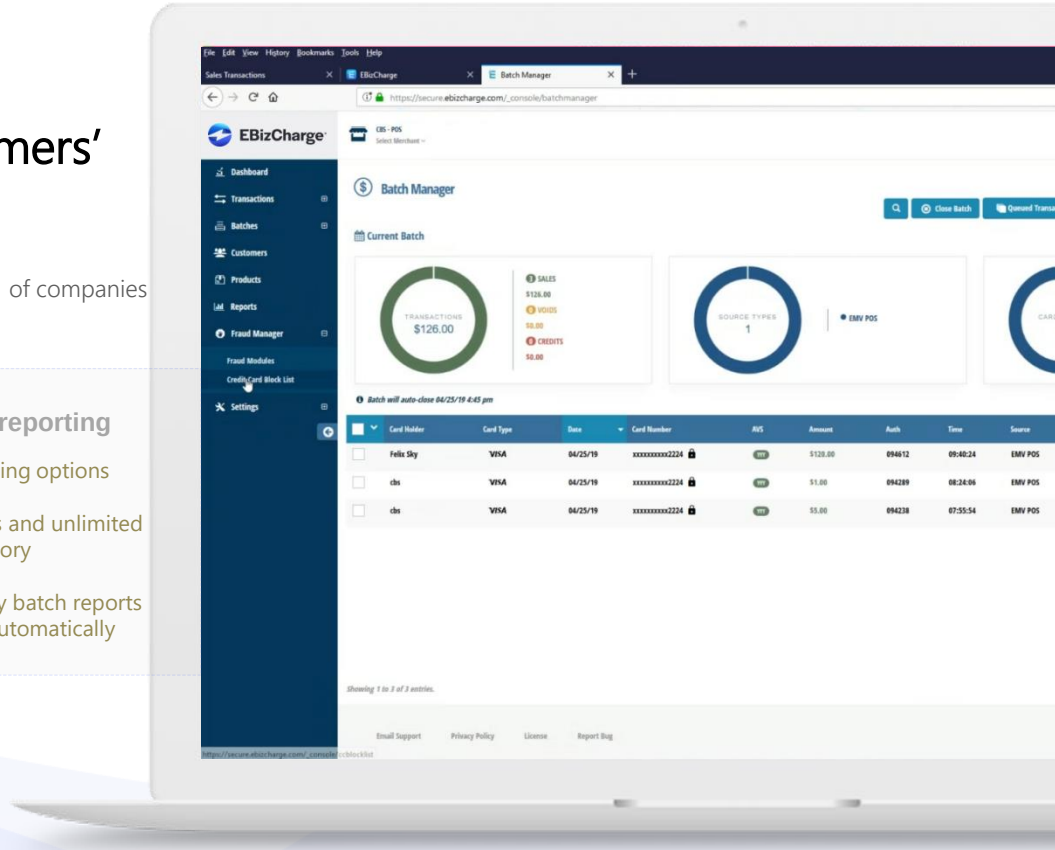
Protect your clients and their customers' data from the most-costly mistakes

Verizon's 2017 Payment Security Report found that "nearly half (44.6%) of companies failed to protect payment card data on an ongoing basis."

- ✓ Encryption and tokenization
- ✓ Filter out unwanted fraudulent transaction attempts
- ✓ Reduce your liability with offsite data storage

Plus robust reporting

- ✓ Overnight funding options
- ✓ Custom reports and unlimited transaction history
- ✓ Clients get daily batch reports in their inbox automatically



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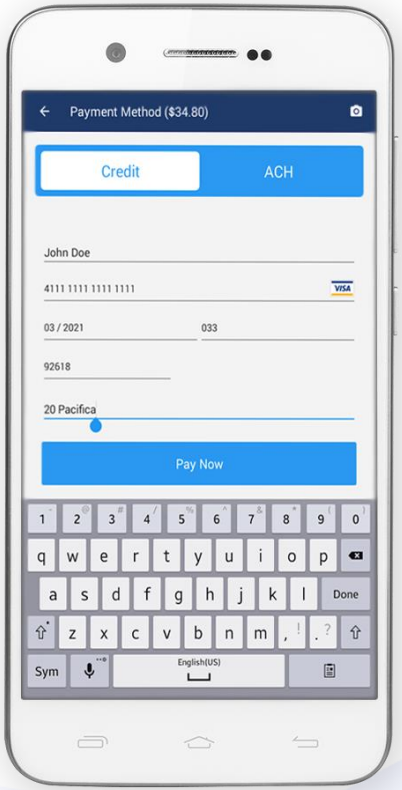
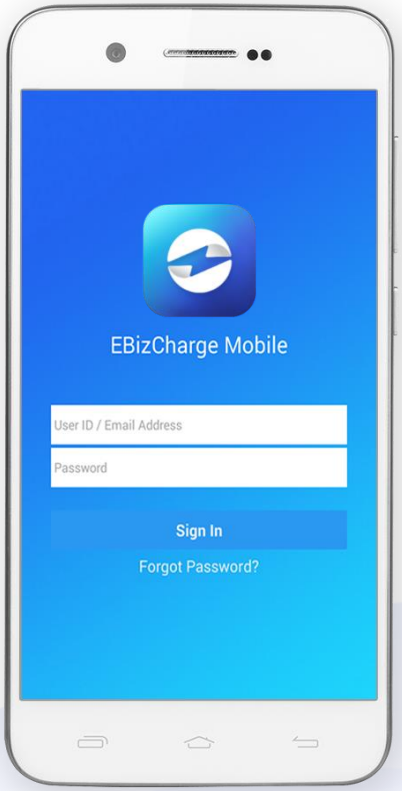
Accept payments on the go

- ✓ Instantly email or text receipts to customers
- ✓ Easily sync payment data back to Dynamics
- ✓ PCI compliant and protected by tokenization and encryption
- ✓ Use Wi-Fi or Bluetooth to make wireless payments
- ✓ Run EMV payments with the MP200L and Vega3000 chip card readers

GET IT ON Google Play

Download on the App Store





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Flexible EMV options

- ✓ Clients can accept EMV payments in the field, in their store, or in the office
- ✓ PCI compliant and protected by tokenization and encryption
- ✓ Lifetime guarantee
- ✓ Use Wi-Fi or Bluetooth to make wireless EMV payments
- ✓ Syncs payment information back to accounting software

Castles MP200L

Mobile payment device using Bluetooth and Wi-Fi

Vega3000

Stationary payment device using Ethernet and Wi-Fi

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Microsoft Dynamics +

Dynamics integration

Email pay

EBizCharge customer payment portal

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Microsoft

Concluding Comments

- Path to digital transformation varies form one organization to another.
  - One size does not fit all!
  - Simpler is better
- Digital Transformation Ready?
  - Arrange a consult/discussion session on plans and needs to determine a best fit approach.
- Microsoft Cloud Opportunities?
  - Arrange a Complimentary Microsoft Test Drive & your payment processing needs to identify opportunities.

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Thank You for Attending!

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