

# Dynamics 365 Project Operations

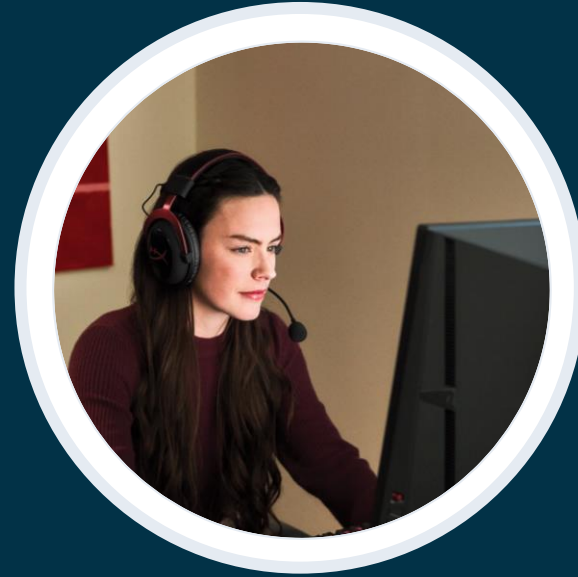
# Background...

Microsoft has deep expertise and rich history with front office, back office, collaboration, productivity, and project management.



## 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.

# 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.



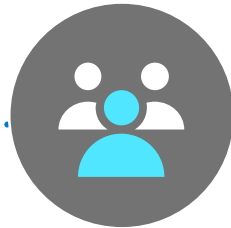
Project Sales



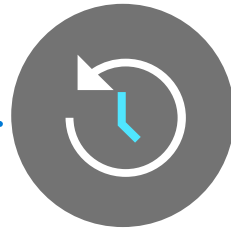
Project Planning



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

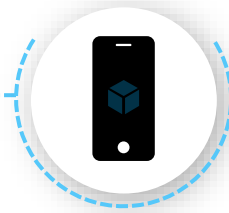
# The services economy is booming, and organizations need:



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

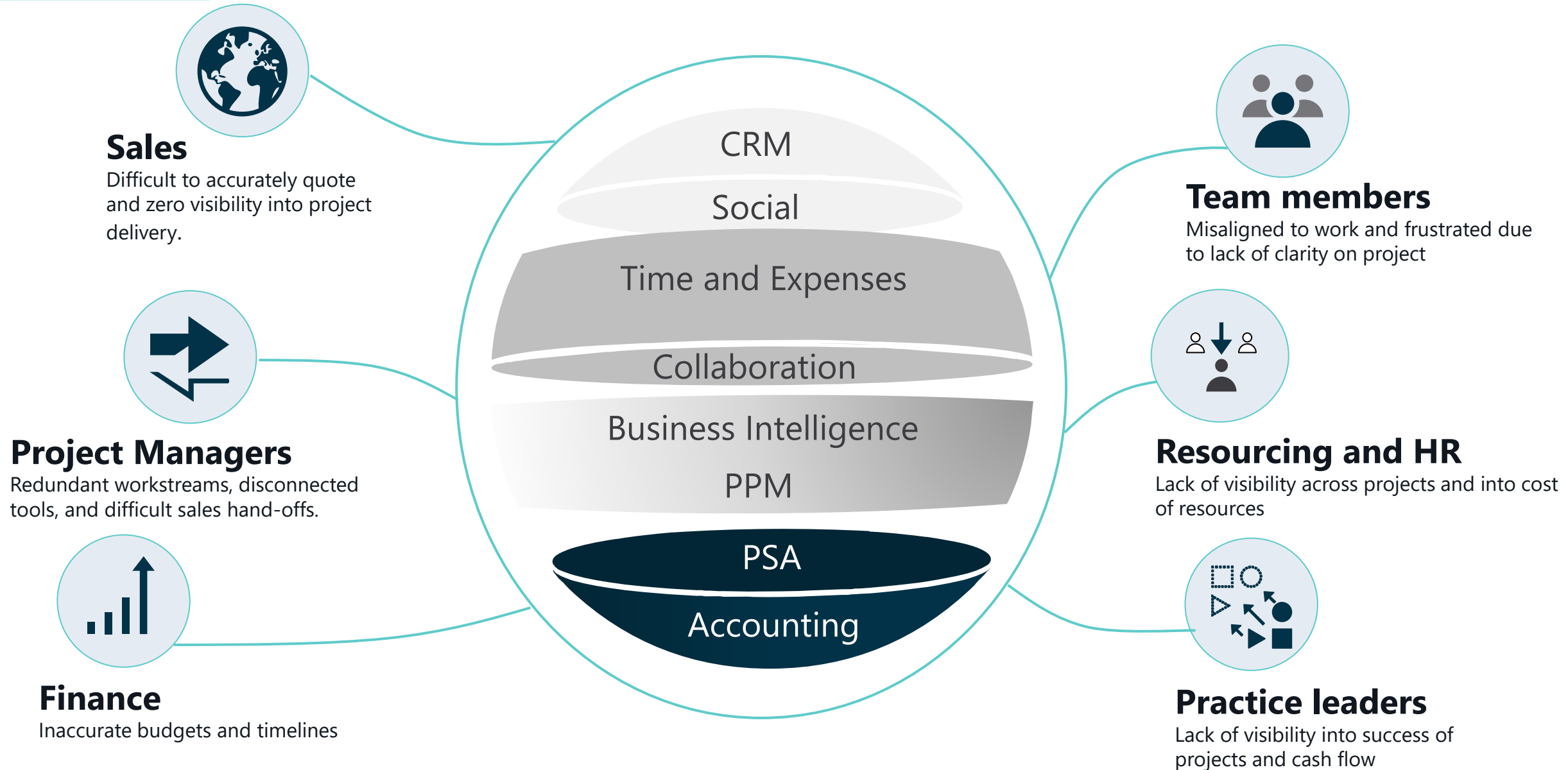


Automation of business processes from lead to billing to insight



Optimization of their workforce and productivity to ensure project success

# Legacy technology creates critical business challenges



# Improve visibility, collaboration and insights with a collaborative solution



# Dynamics 365 Project Operations



**PROJECT SALES**  
Deliver a  
differentiated  
customer experience

**RESOURCING**  
Optimize resource  
utilization

**PROJECT MANAGERS**  
Accelerate project  
delivery

**TEAM MEMBERS**  
Improve  
collaboration and  
quality of work

**FINANCE**  
Maximize project  
profitability

**LEADERS**  
Increase innovation  
and business agility

Increased client satisfaction, revenue, renewals, trust, and loyalty.

Improved resource utilization, productivity, optimized staffing, and employee retention.

Improved project and client insight, accelerate delivery, reduced cost of operations and service delivery.

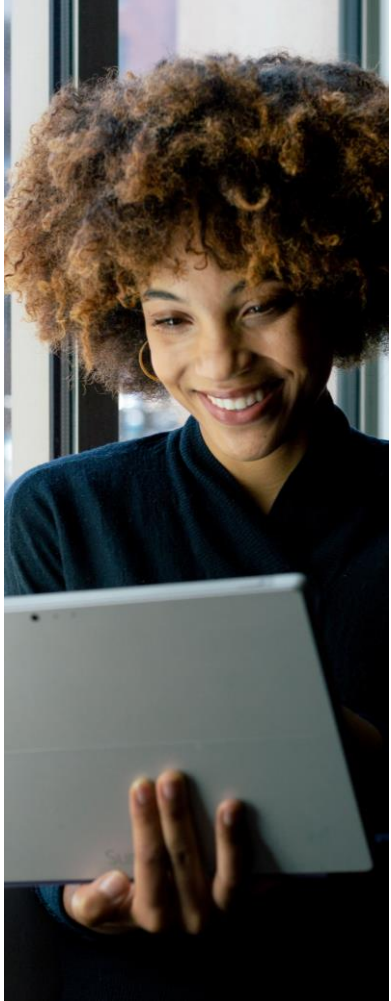
Improved client insight, quality of work, time to impact, and work satisfaction.

Faster time to billing, compliance, higher profit margins, revenue growth on project-based services.

Reduced time to market for innovative services, lower OPEX, and operational excellence.

*Project success—delivered! On-time, on-budget—every time.*

**Visibility,  
collaboration,  
and insights  
across the  
project  
operations  
business cycle.**



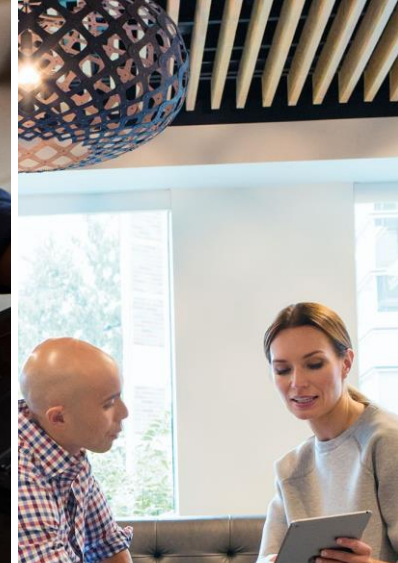
**RESOURCING  
Optimize  
resource  
utilization**



**PROJECT SALES  
Win more  
contracts**



**PROJECT MANAGERS  
Speed project  
delivery**



**TEAM MEMBERS  
Improve  
productivity  
and simplify  
time and  
expenses**



**PROJECT FINANCIALS  
Maximize  
profitability**



# PRACTICE LEADERS: Discover business insights and increase agility

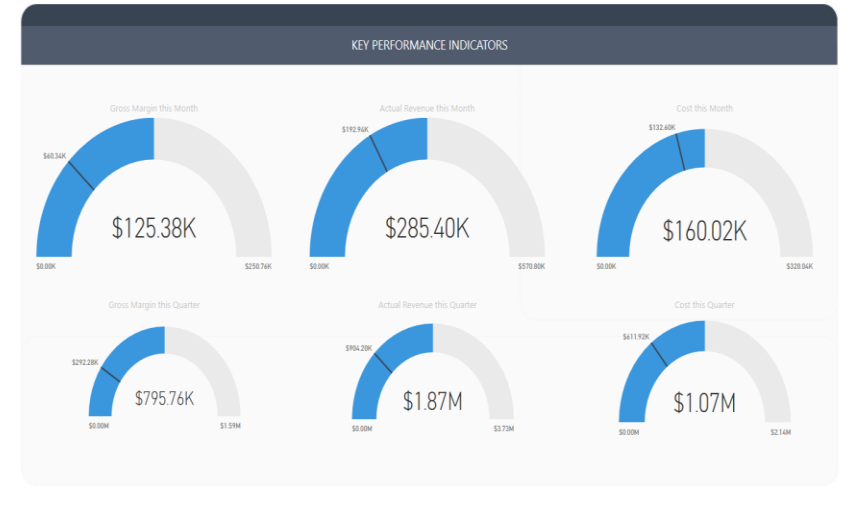
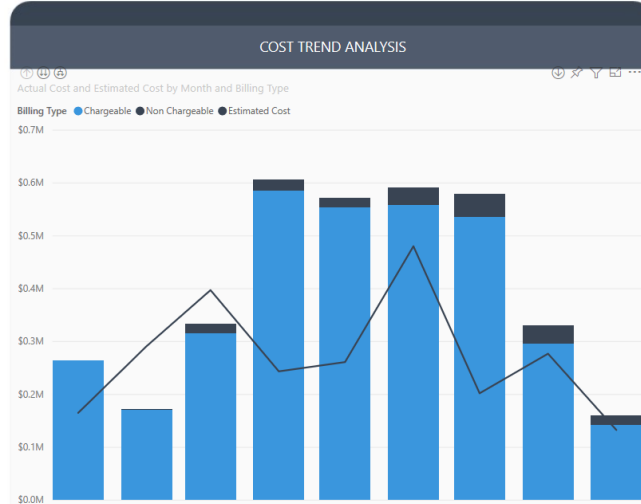


**Gross Margin by Customer this Month**

Customer Name	Estimated Gross Margin	Actual Gross Margin	Gross Margin Variance
Metallic Paint and ...	\$29,760.00		(\$29,760.00)
Work and Play Asso...	\$5,180.00	\$15,700.00	\$10,520.00
Closeout Boutique	\$12,900.00	\$26,980.00	\$14,080.00
Rally Master Comp...	\$12,500.00	\$29,800.00	\$17,300.00
Technical Parts Man...		\$17,600.00	\$17,600.00
Retail Sporting Equi...		\$35,300.00	\$35,300.00
<b>Total</b>	<b>\$60,340.00</b>	<b>\$125,380.00</b>	<b>\$65,040.00</b>

**Gross Margin by Resource this Month**

Resource Category Name	Resource Name	Actual Gross Margin
Functional consultant	Abraham McCormick	\$5,500.00
Technical consultant	Allison Dickson	\$6,300.00
Program Manager	Ashley Chinn	\$3,200.00
Functional consultant	Bernadette Foley	\$5,500.00
Developer	Bob Kozak	\$3,000.00
Technical consultant	Cheri Castaneda	(\$700.00)
Technical consultant	Christal Robles	\$6,300.00
Technical consultant	Christie Dawson	\$6,300.00
Technical consultant	Clarence Desimone	\$6,900.00
Architect	Davis Flournoy	\$6,000.00
<b>Total</b>		<b>\$125,380.00</b>



Drive innovation through better business decisions with access to data and insights.

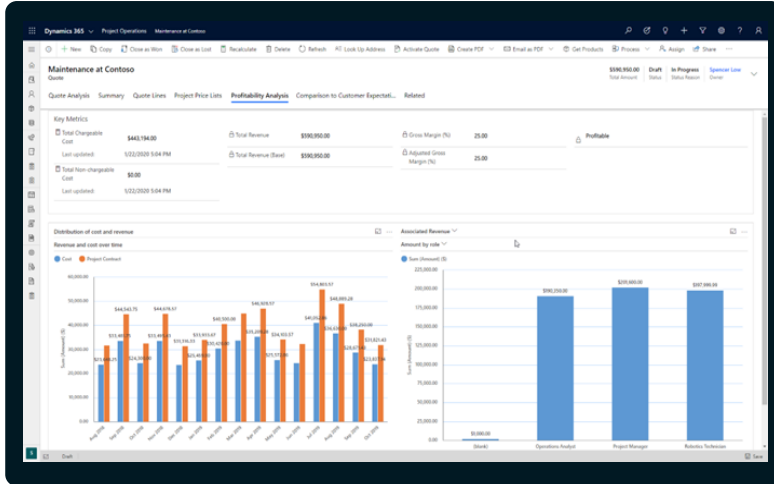


Gain a complete view of each project with PowerBI to understand upcoming business needs.



AI and machine learning accelerate business insights and decision-making

# SALES: Win more customers



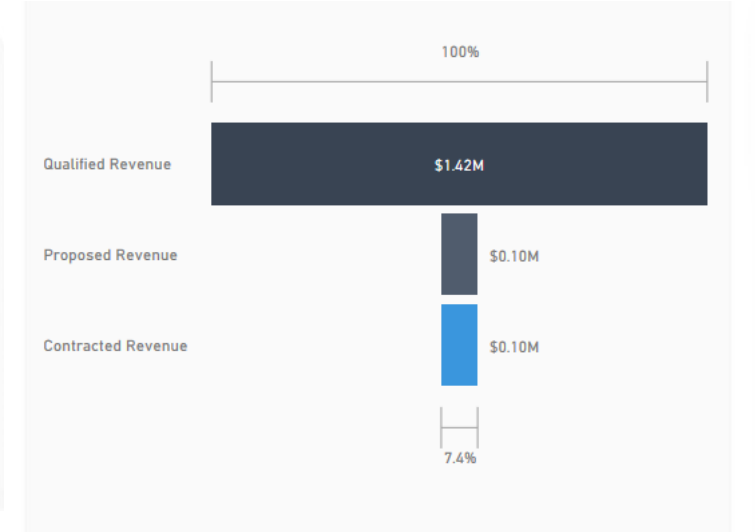
Improve customer satisfaction with quotes and relationship management.

Open Opportunities

Opportunity Name	Customer Name	Opportunity Estimated Revenue
Chic CRM - Opportunity 2	Chic Department Stores	\$240,000.00
Chic CRM - Opportunity 3	Chic Department Stores	\$140,000.00
Chic CRM - Opportunity 4	Chic Department Stores	\$160,000.00
Chic CRM - Opportunity 5	Chic Department Stores	\$180,000.00
CRM Implementation for Alpine	Alpine Ski Shop	\$240,000.00
CRM Implementation for Chic - APAC Opp	Chic Department Stores	\$170,000.00
CRM Implementation for Chic - NA Opp	Chic Department Stores	\$190,000.00
CRM Ticketing Opportunity	Alpine Ski Shop	\$20,000.00
RM Tool	Active Transport Inc.	\$80,000.00
<b>Total</b>		<b>\$1,420,000.00</b>

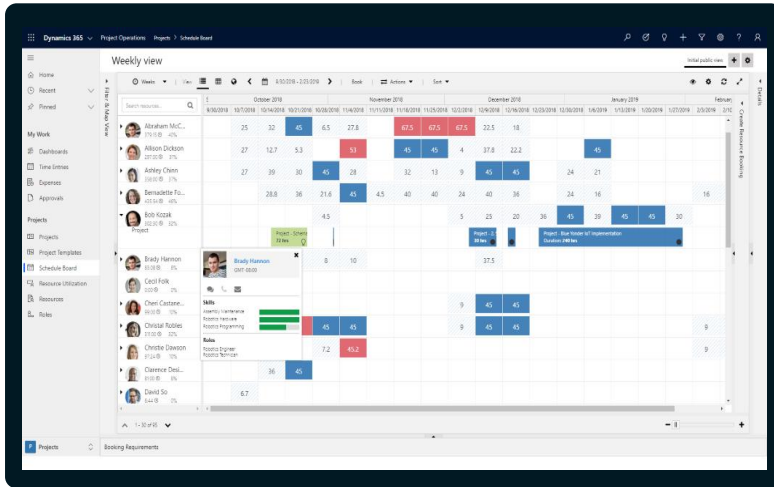


Convert more sales opportunities with forecasting tools and pipeline visibility.

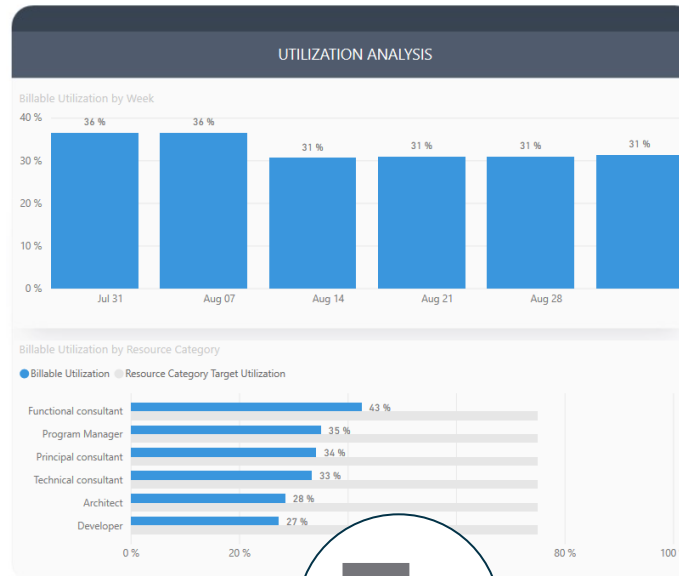


Visualize sales opportunities and prioritize deals in a single management dashboard.

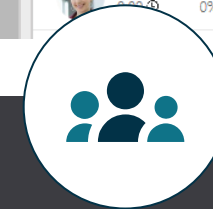
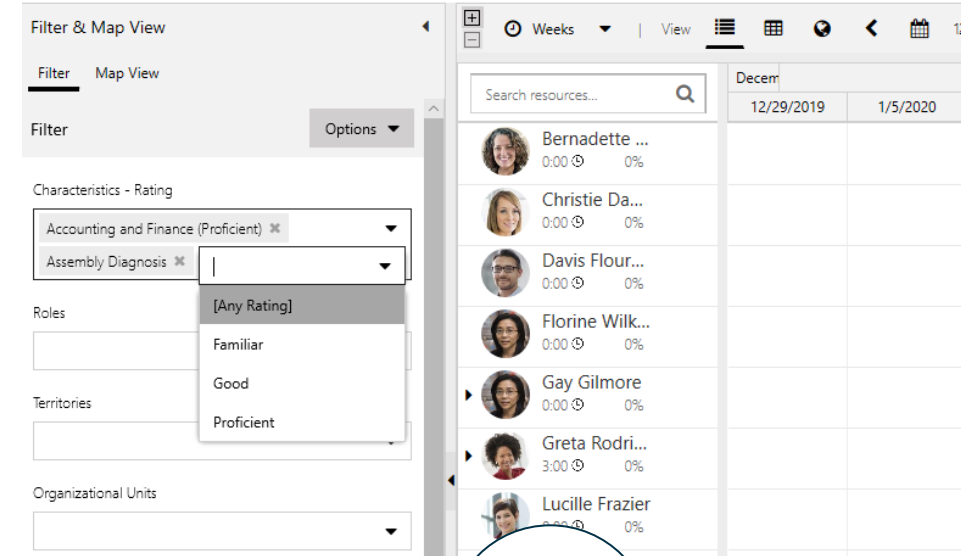
# RESOURCING: Optimize resource utilization



Match team member skill sets with project demands and identify gaps in resourcing.

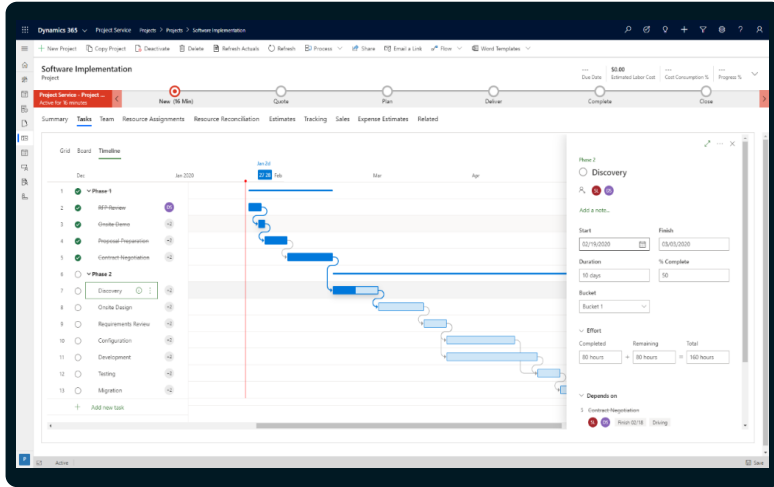


Improve efficiency with broad visibility into availability and dynamic scheduling.

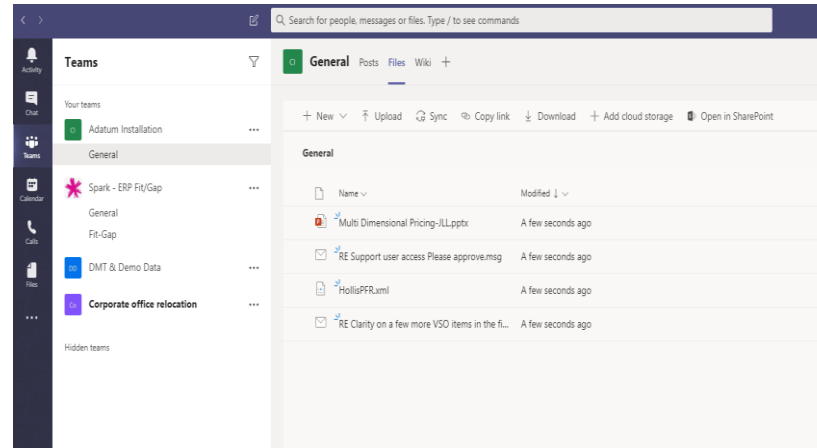


Identify and prioritize resources to address staffing needs more completely and in less time.

# PROJECT MANAGEMENT: Speed project delivery



Empower teams with increased transparency, streamlined communication, and higher accountability.



Plan, manage, and measure the performance of each project with visibility to mitigate project risk.

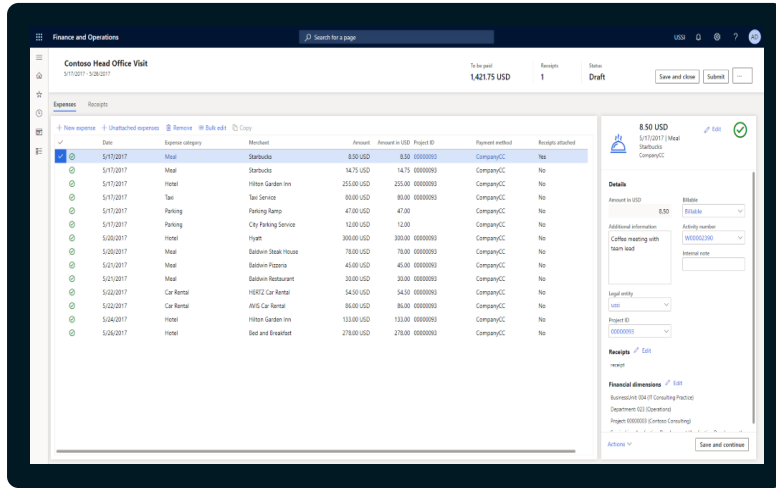
The screenshot shows the 'Resource Reconciliation' dashboard for the 'Adatum Installation Offshore Model' project. The dashboard displays a grid of resource bookings over time, with columns for dates from 10/28/2019 to 11/4/2019. Resources listed include Abraham McCormick, Bernadette Foley, Christal Robles, and Davis Flourney. The grid shows 'Booked' and 'Assigned' resources with their respective hours. A legend at the bottom indicates 'Booking shortage' (yellow) and 'Excess bookings' (blue).

Resource	Total	10/28/2019	10/29/2019	10/30/2019	10/31/2019	11/1/2019	11/2/2019	11/3/2019	11/4/2019	11/5/2019	11/6/2019
Abraham McCormick	40.00	8.00	8.00	8.00	8.00	8.00					
Booked	40.00	8.00	8.00	8.00	8.00	8.00					
Assigned											
Bernadette Foley	64.00	8.00	11.00	11.00	11.00	11.00			8.00	4.00	
Booked	48.00								8.00	8.00	8.00
Assigned											
Christal Robles	48.00										
Booked	48.00										
Assigned											
Davis Flourney	64.00		8.00	8.00	8.00	8.00				8.00	8.00
Booked	64.00		8.00	8.00	8.00	8.00				8.00	8.00
Assigned											
Total	216.00	16.00	27.00	35.00	35.00	35.00	0.00	0.00	16.00	20.00	16.00

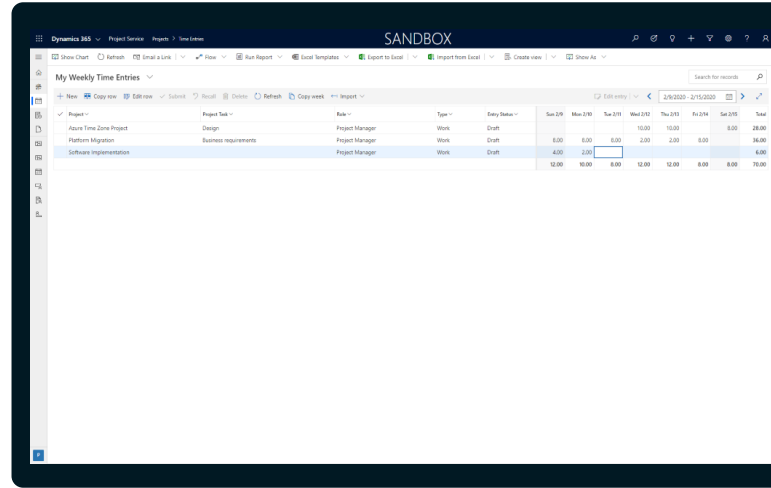


Give project managers at every skill level the tools they need to succeed with accessible dashboards and intuitive tools.

# TEAM MEMBERS: Improve productivity and simplify time and expenses



Submit, approve, process, and reconcile time and expenses, from anywhere.

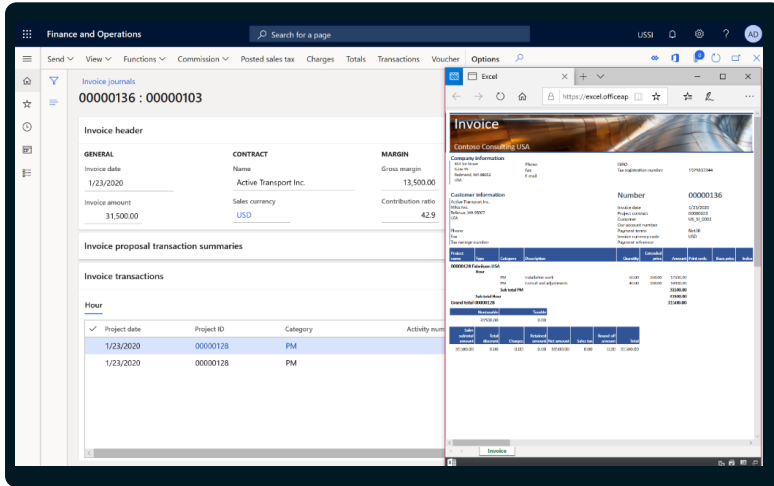


Increase project compliance with easy-to-use time and expense tracking tools.

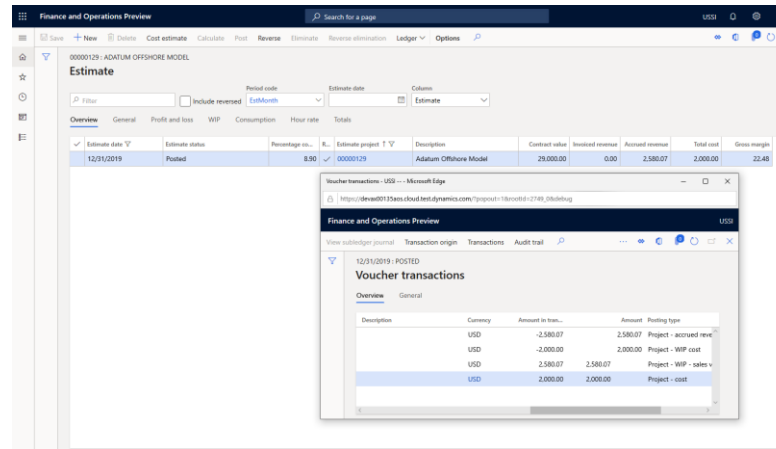


Quickly connect to the apps and services your team is already using.

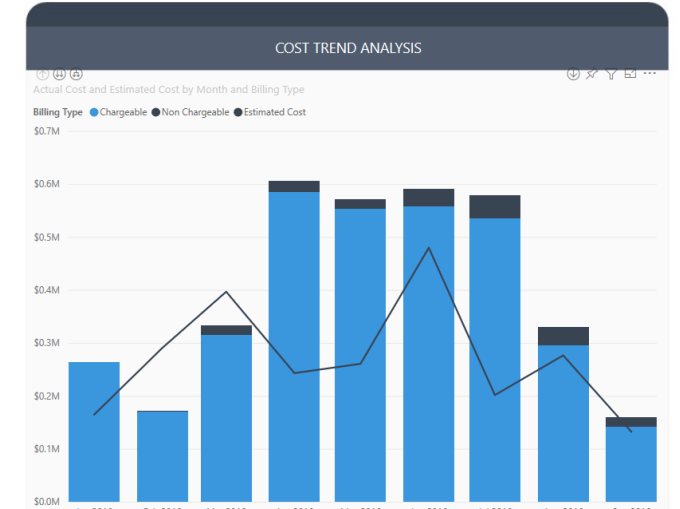
# FINANCE: Maximize Project Profitability



Plan, manage, cost, and measure the performance of each project.



Foster best practices and ensure compliance to published standards and practices.



Quickly and accurately track project spend and payables with invoicing and purchase order management.

# Microsoft Dynamics 365 for 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

# Next steps





# Take the next step

Get started with Dynamics 365 Project Operations—  
empower your digital transformation by applying  
intelligence and connecting your data.

[Contact us](#)



Microsoft Dynamics 365