Introduction/Overview

Microsoft Dynamics 365 for Member Management

March 2024

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Business Applications

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Gold Enterprise Resource Planning
Gold Small and Midmarket Cloud Solutions
Silver Cloud Customer Relationship Management

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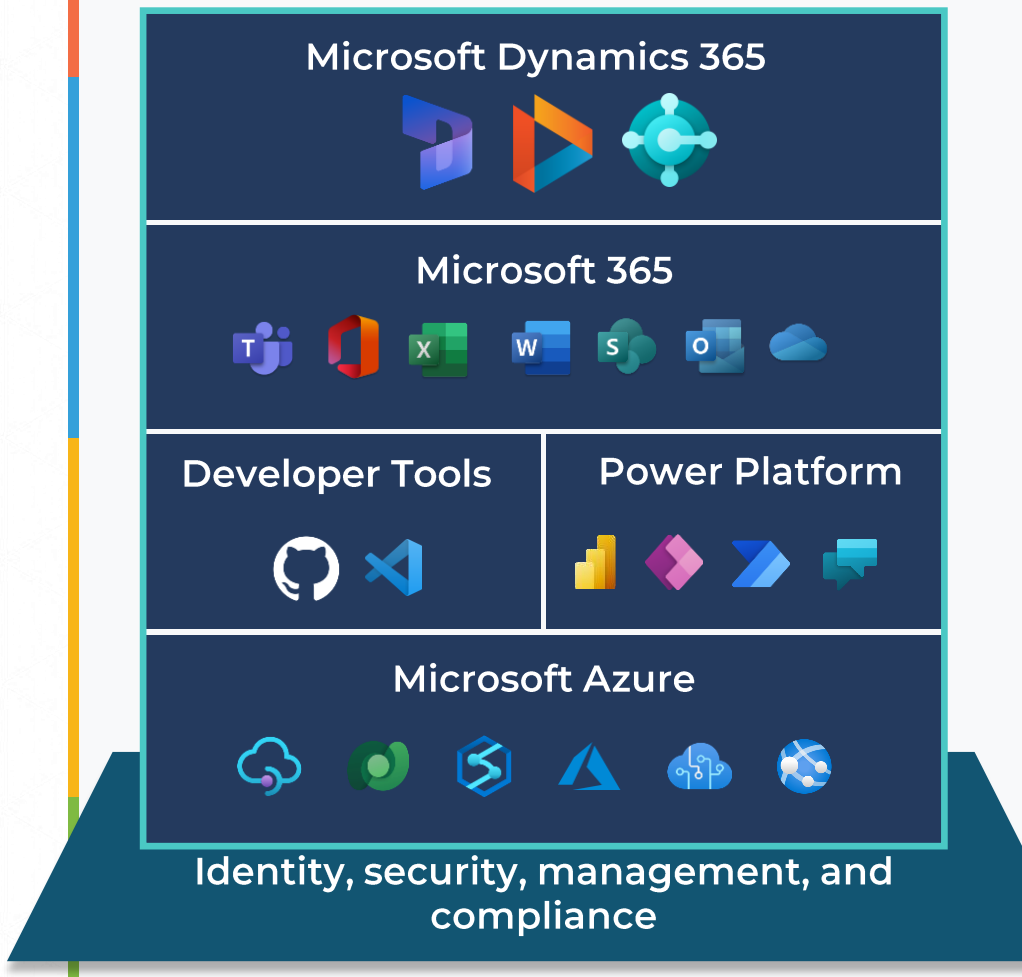
Your Dynamics 365 Project Partner

Contents

- Microsoft Dynamics 365 / Power Platform
- Member Services solution
- Microsoft Cloud
- Extensibility
- Roadmap
- Implementation approach
- Support model



Microsoft Dynamics 365 – *one system, many applications*

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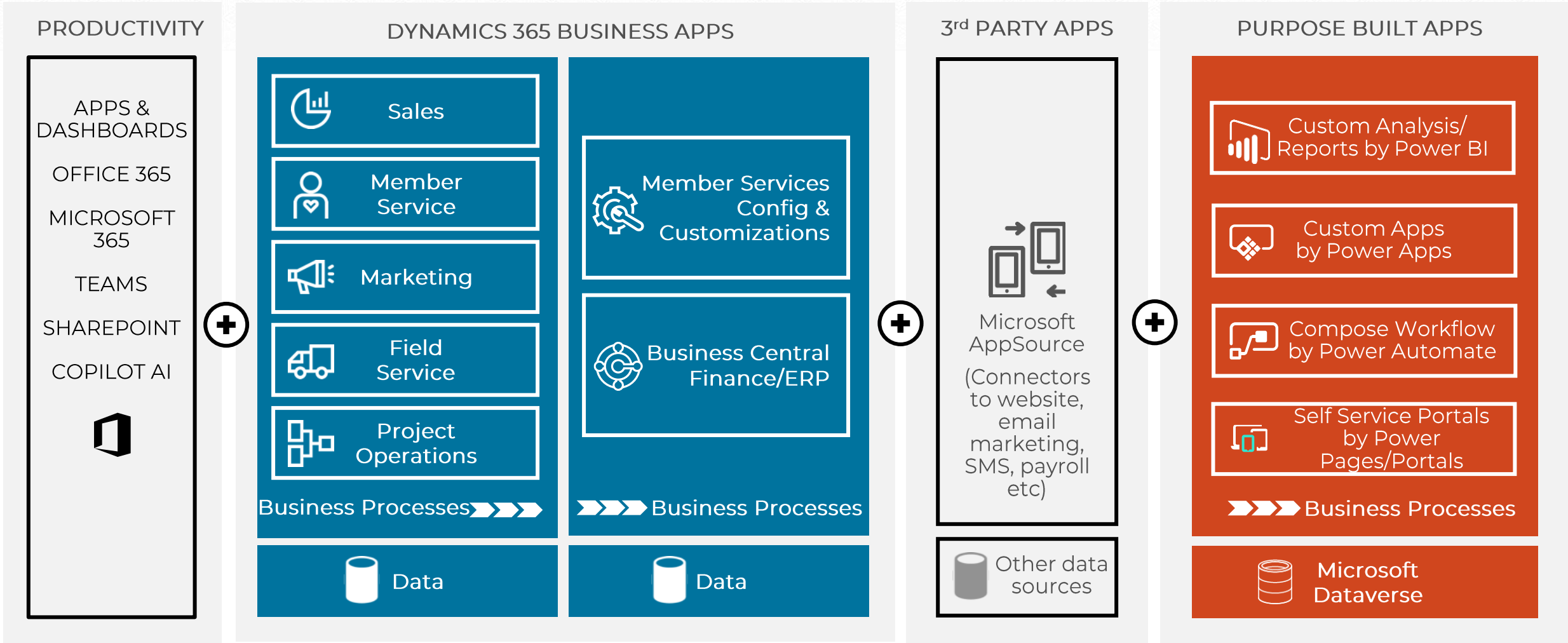
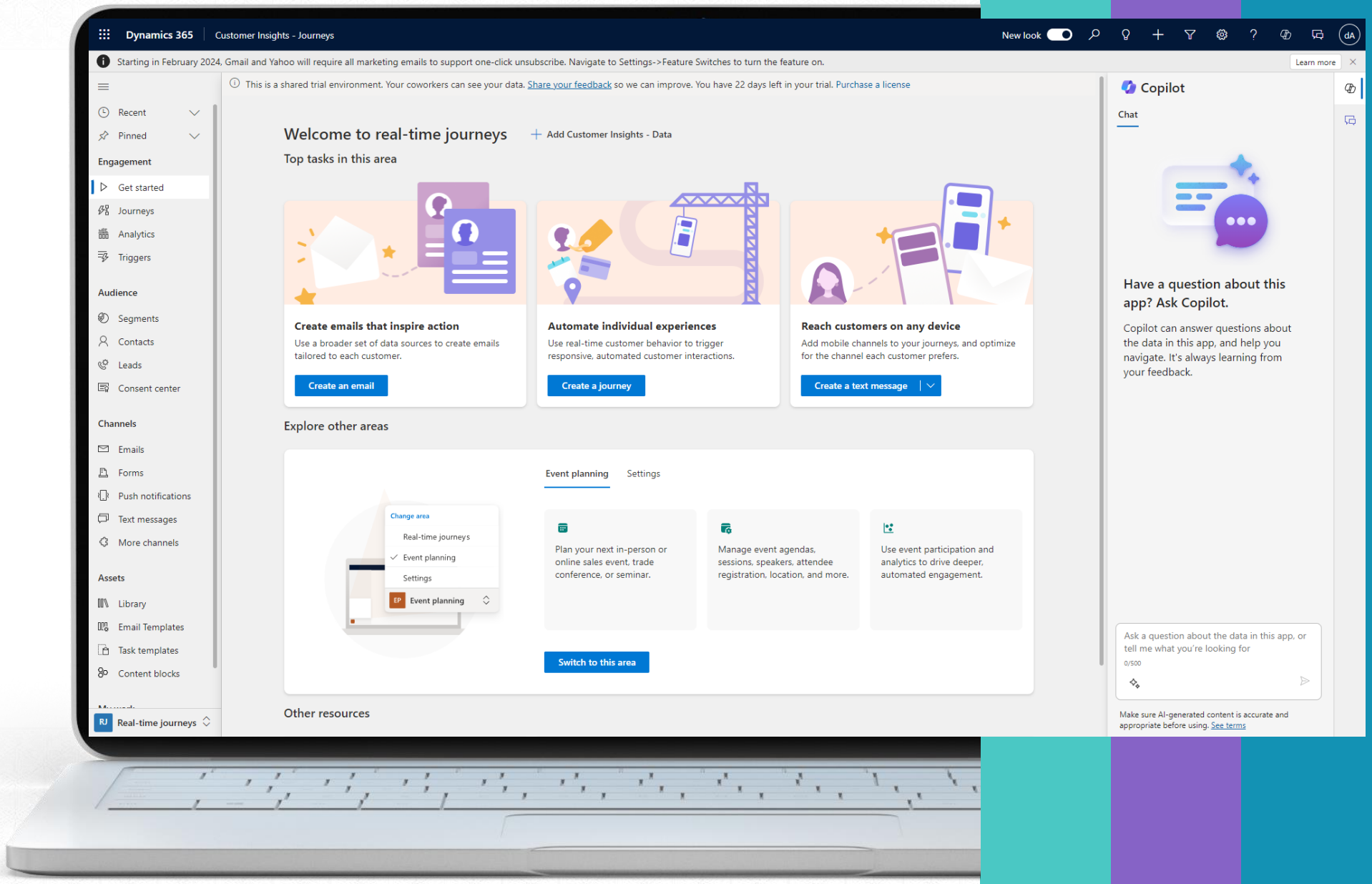
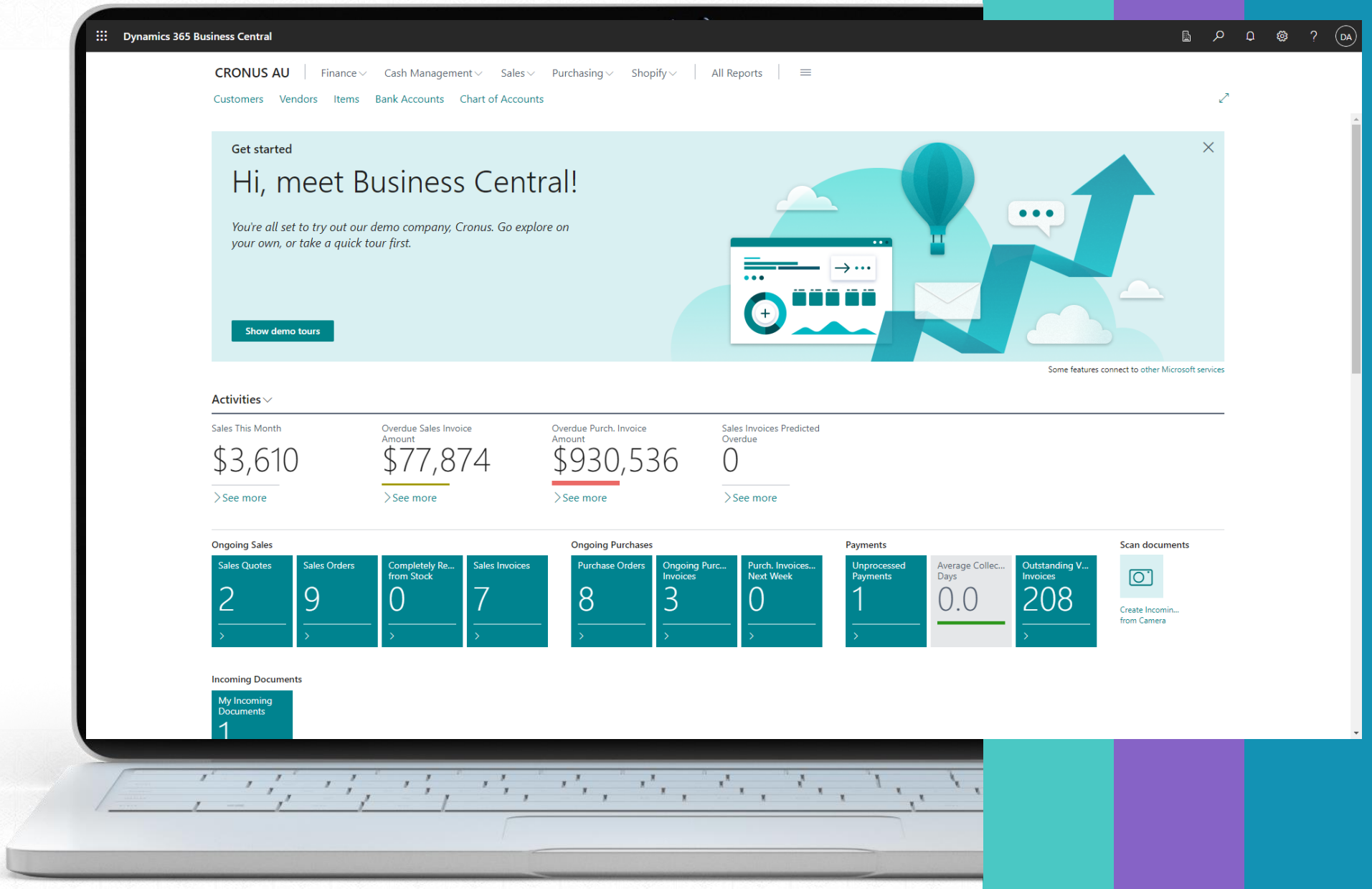


Dynamics 365 provides powerful configuration and app making capabilities that don't require you to write a single line of code. With a comprehensive set of WSYSIWYG designer and editor tools, almost anyone (with training) can configure and/or customise Dynamics 365 or create their own custom apps.

Dynamics 365 for Member Management/CRM



Dynamics 365 for Member Finance Management/ERP



Dynamics 365 for Member Management

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Connects enquiries, enrolments, members, plans, renewals, events and invoicing in a single solution to help industry groups and associations adapt faster, work smarter, and improve member outcomes.

High level heat map assessment/domains of member services

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Member Self Serve & Online Portals / Omni-Channel Capability

CRM	Member Workforce Management	Service Delivery	Contact Management	Workflow Automation	Document & Records Management	Knowledge Management	Integrations
Enquiries/ WordPress	Forecasting & Capacity Planning	Membership	Marketing, Comms & Events	Tasks	Document Templates/ DocuSign Adobe	Training & Development	Payroll
Onboarding	New Tiers/ Resource Assignment	Tiers	Surveys, Feedback, Complaints & Incidents	Reminders	Contract Management	Policies & Procedures	HR
Member Management	Rostering	Rewards	Correspondence Handling	Risks & Alerts/SMS	Records Management/ SharePoint	Process Guidance	LMS
Relationships	KPIs & Reporting/ Power BI	Renewals	Offboarding/ Exit Process	Notifications	Audit/History	Continuous Improvement	Finance
		Payment Portal	Quality & Compliance	Escalations/ Power Automate			Website, Portals

System Administration, Security & Access Management

Operational Reporting / Charts & Dashboards

Mostly Out of Box *Requires Configuration* *TBD/Customisation?*

Supporting the member journey

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Demonstration “One Pager”, Microsoft Dynamics 365							
1. Enquiry	2. Member Onboarding	3. Planning & Renewal	4. Service Agreement	5. Service Schedule, Rostering	6. Service Delivery	7. Time Recording	8. Finance, Invoicing & Payments
Caller	Summary	Tier	General Details	Resources	Event Bookings	General Details	Invoices
Potential Member	Details	Rewards	Quote	Marketing/ Events	SMEs	Receipts	Payroll
Summary	Relationships	Renewal	DocuSign / Adobe Sign	Scheduling/ Schedule Board	Activities	Progress Notes	HR/WHS
Enquiry Tasks	Profile & Goals			Categories	Booking Bidding/Offers	Staff Mileage Claim	Finance
Referrals	Membership			Groups	Issues/ Incidents		Website, Portals
	Documents/ Files			Team Rosters	Service Exit		
System Administration, Settings & “App Maker” Management							
Operational Reporting / Charts & Dashboards, Power BI							

Dynamics 365 for Member Management “super-app”

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Supporting multiple services including:

- Administration
- Asset and Service Management
- Event Management
- Finance
- HR Management
- Incident Management
- Invoice Automation
- Marketing
- Member Management
- Payroll
- Risk Management
- Sales
- Signatures, Adobe & DocuSign

Business Central capabilities (including Shopify integration)

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Finance and Accounting

- General Ledger
- Unlimited Dimensions
- Multiple currencies
- Multiple companies
- Budgets
- Financial reporting
- Consolidation
- Intercompany postings
- Statistical accounts
- Cash flow forecast (AI)
- Fixed assets
- Cost accounting
- Deferrals
- Electronic payments/direct debits
- Customer payment process
- Late payment prediction (AI)
- Bank account reconciliation
- Bank account management
- Check writing

Sales and marketing

- Contact management
- Campaign management
- Interaction and email logging
- Opportunity management
- Dynamics 365 Sales integration

Sales and delivery

- Sales invoicing
- Sales order management
- Sales line pricing and discounting
- Campaign pricing
- Sales invoice discounts

Purchasing and payables

- Purchase invoicing
- Purchase order management
- Purchase return order management
- Alternative order addresses
- Purchase invoice discounts

Inventory

- Inventory control
- Item categories and attributes
- Item tracking
- Multiple locations
- Location transfers

Supply planning and availability

- Supply planning
- Demand forecasting
- Sales and inventory forecasting (AI)
- Order promising
- Calendars

Project management

- Basic resources
- Capacity management
- Multiple costs
- Jobs
- Time sheets

Service management*

- Planning and dispatching
- Service contract management
- Service item management
- Service order management
- Service price management

Warehouse management

- Bin Tracking
- Inventory picks and put-aways
- Warehouse receipt
- Warehouse shipment

Manufacturing*

- Assembly management
- Standard cost worksheet
- Production bill of materials
- Basic capacity planning
- Machine centers
- Version management

*Available in Dynamics 365 Business Central Premium

Microsoft Cloud security and compliance

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Reliability, performance, and continuity

Performance and Scale

Security

Business Continuity and Disaster Recovery

Compliance

Why the Microsoft Cloud?

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- Always be on the latest version of the solution without costly upgrades
- No more infrastructure management
- Work seamlessly with other Microsoft products
- Enhanced Microsoft cloud security
- Improve privacy, reliability, and scalability
- Work from anywhere, on any device
- Access predictive analytics, AI, and data visualizations
- Be ready for the future with the latest AI and product innovations

Move with confidence to the cloud now – don't wait

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AIM

for the future with d365Members

Accelerate

Accelerate now to adopt AI-powered technologies

Innovate

Innovate faster to stay ahead of the competition

Move

Move with agility and scale as the membership grows

Start with an AIM Assessment	Get access to expert implementation guidance and services	Benefit from the right investment offers

Learn more about AIM at aka.ms/D365AIM

A truly extensible Member Services solution

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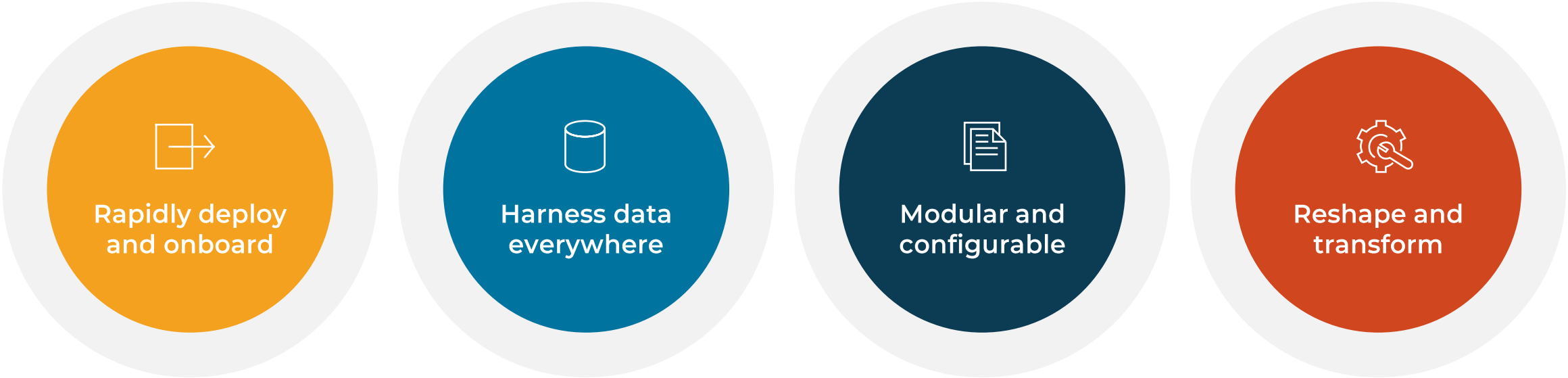

Deploy solutions and onboard users in days or weeks, not months, to innovate and drive Member Services outcomes in less time.

Connect to hundreds of data sources out-of-the-box, or easily create your own connectors, with seamless Office 365, Azure, LinkedIn, social and third-party data sources.

Built using modular, purpose-built configurable Member Services applications that integrate with your existing systems and software tools **to extend capabilities of solutions you already use.**

Work with d365.Global, your trusted Microsoft partner to **accelerate member success and get the most value from Dynamics 365 for Member Management.**

The blueprint for cross-member service impact

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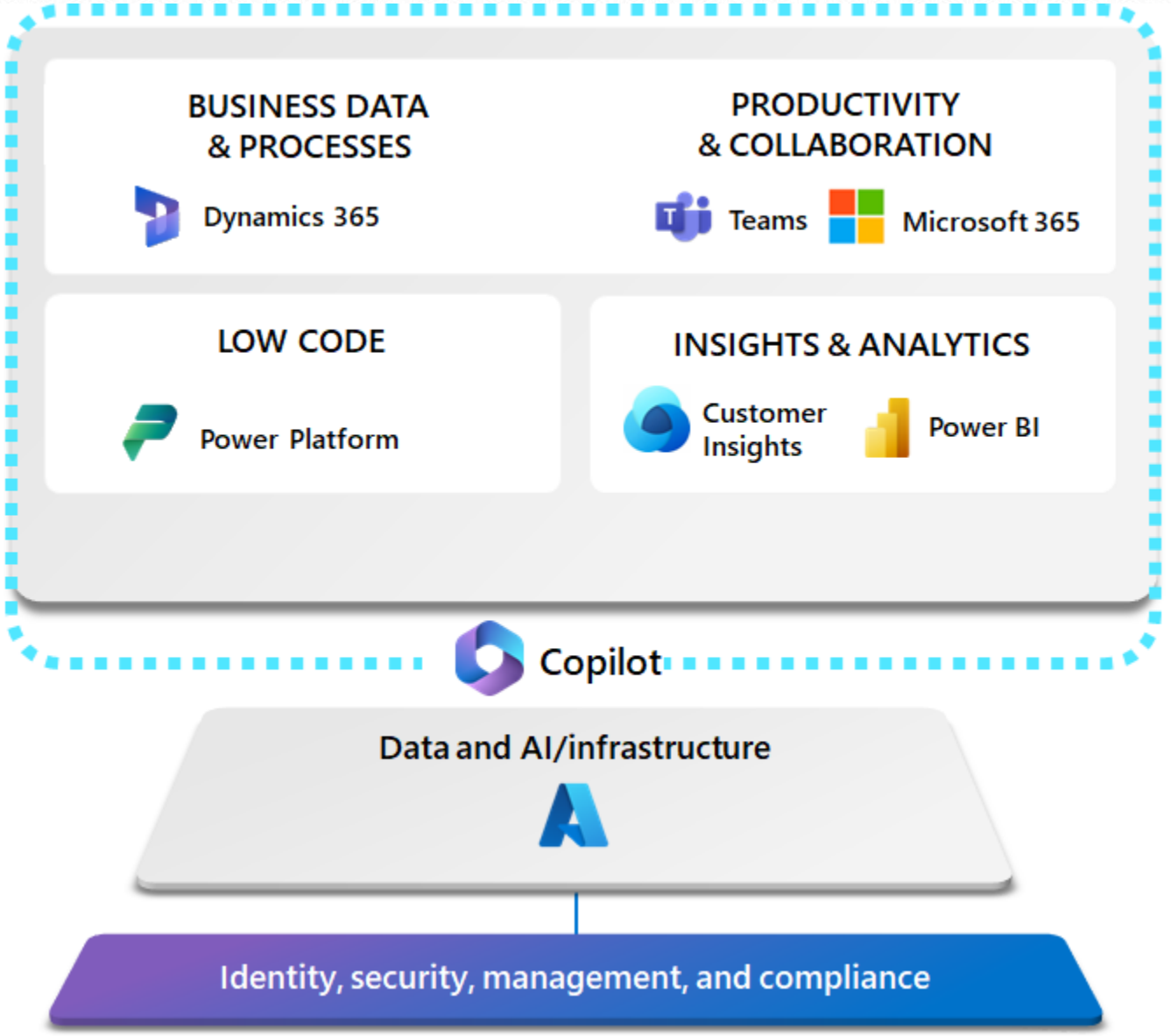

Microsoft Power Platform

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Give everyone the ability to create solutions that enhance the member experience

Power BI

Analyze data

Make informed, confident business decisions by putting data-driven insights into everyone's hands.

Power Apps

Build solutions

Turn ideas into practice solutions by enabling everyone to build custom apps that solve membership challenges.

Power Automate

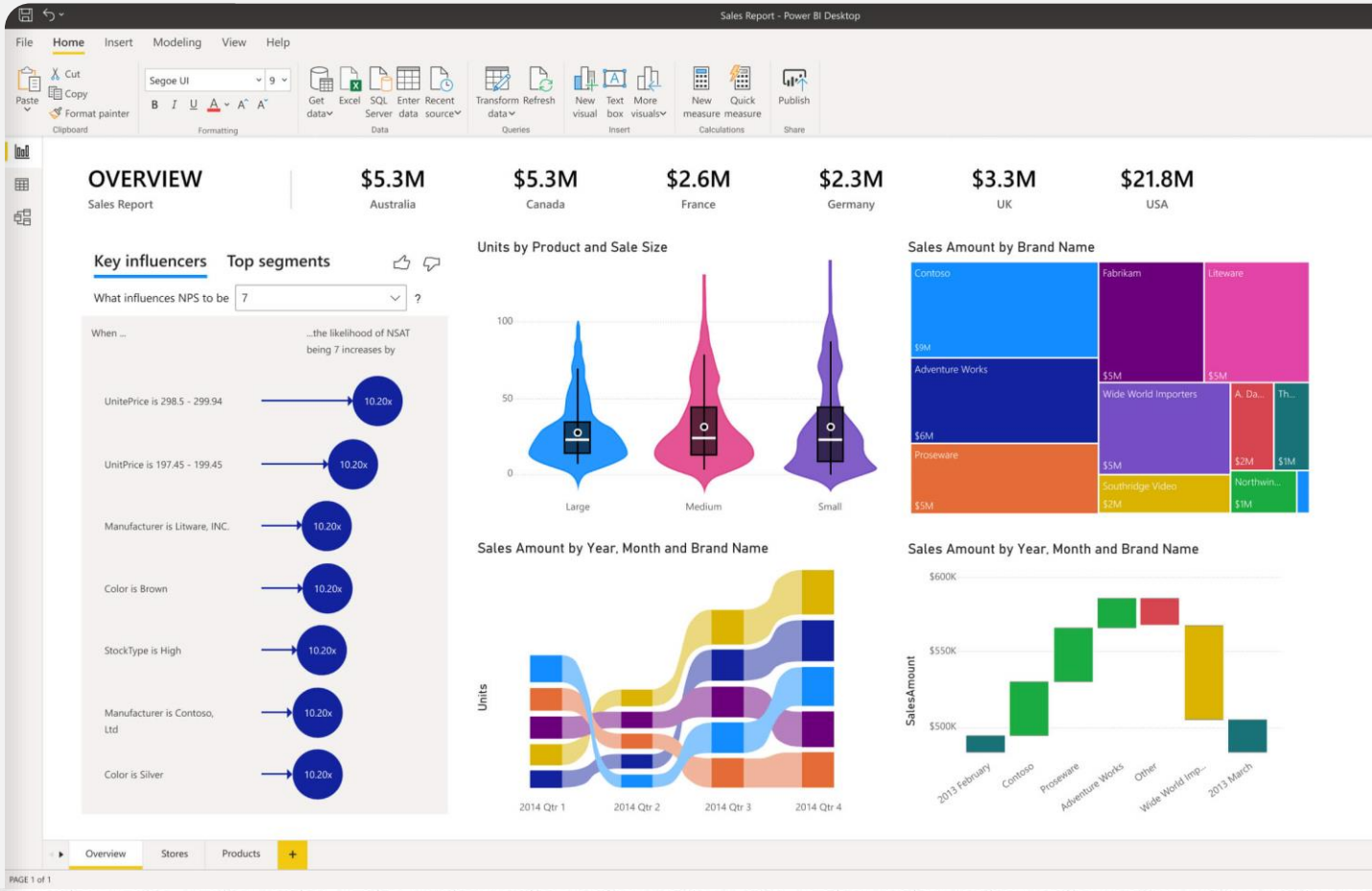
Automate processes

Boost productivity to get more done by giving everyone the ability to automate membership processes.

Power Virtual Agents

Create virtual agents

Easily build chatbots to engage conversationally with your members and employees—no coding required.



Roadmap

A look into the future

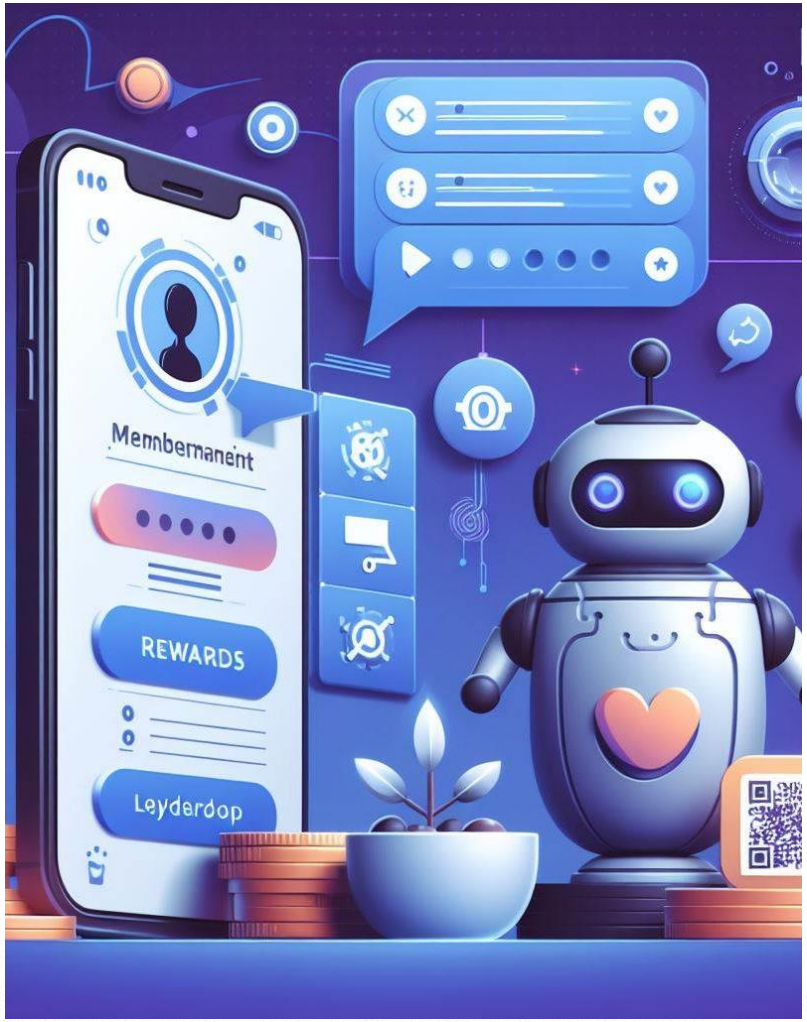


Image created using Microsoft Copilot AI

World class user experience

Dynamics 365 will continue to be a user-friendly business application suite that is efficient, “video-game” fast, and powerful, yet simple to discover and quick to onboard.

Connected

Seamless integration with the world’s data—from social, banking, payments, and membership management—to large datasets like Census data, currencies, weather, taxes and traffic information.

Predictive

With connected data the user experience turns upside down; AI augments human intelligence to optimize processes, make predictions, delight members, and revolutionize how member-based organizations are run.

Implementation – project methodology (CRP – Conference Room Pilot)

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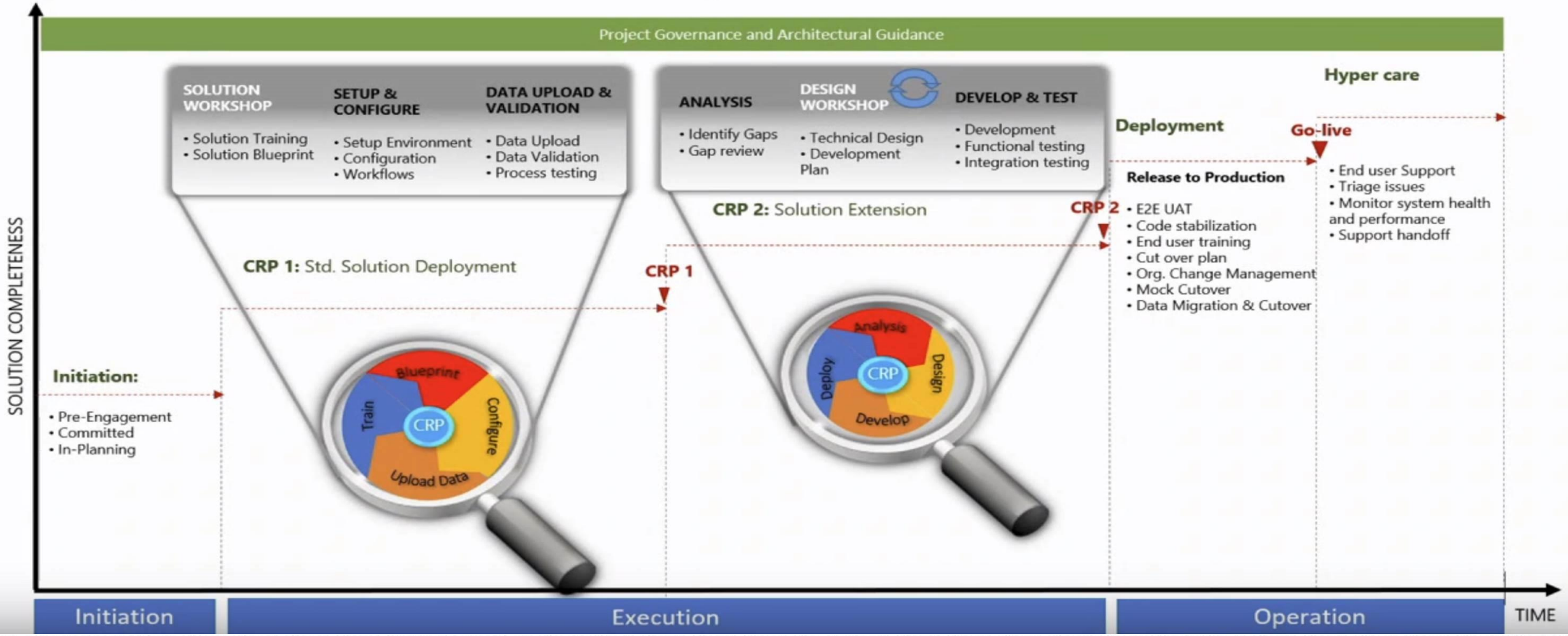
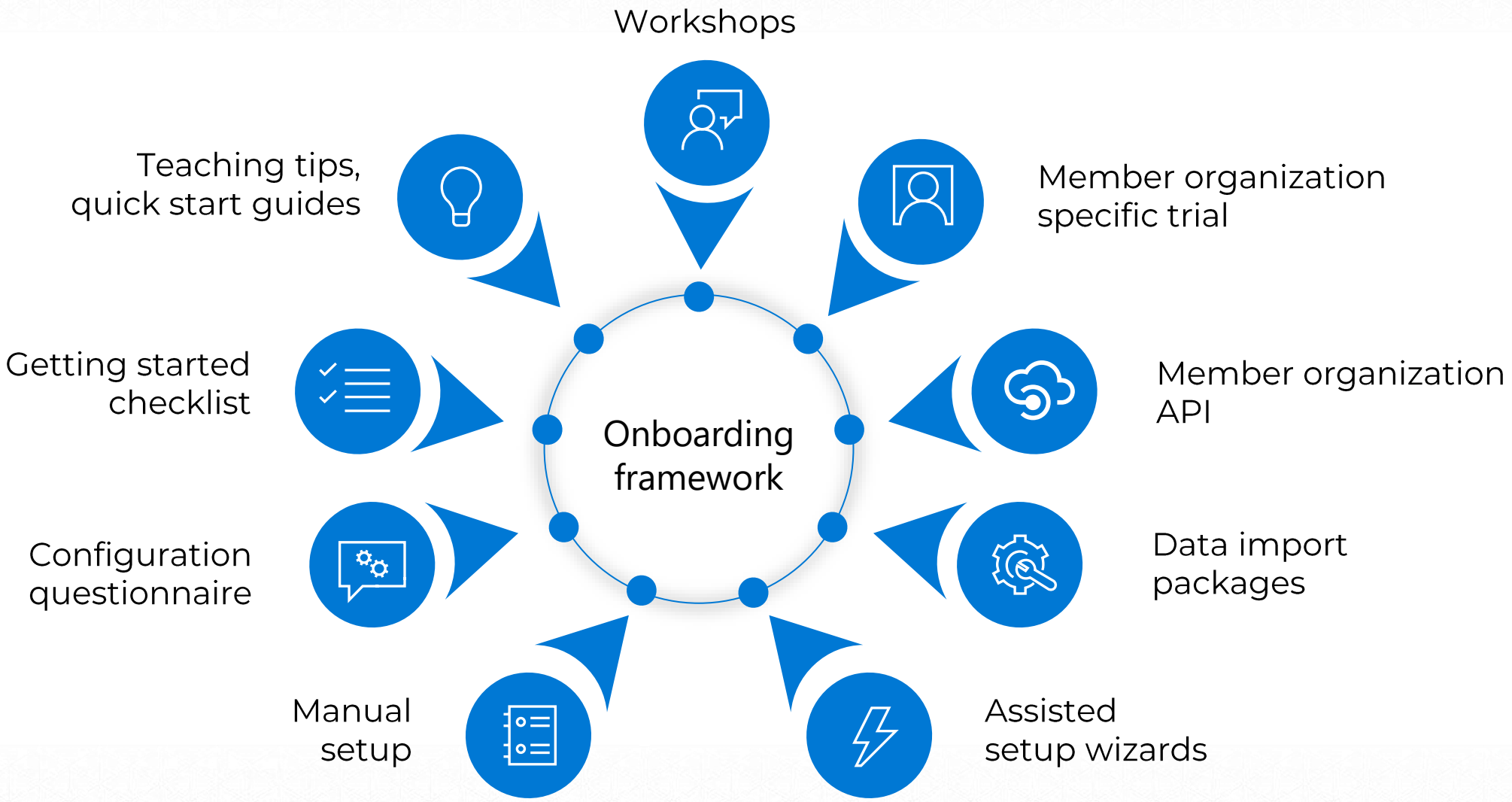
Implementation using CRP



Onboarding framework for ease and speed



Sample timeline (Member Services solution)

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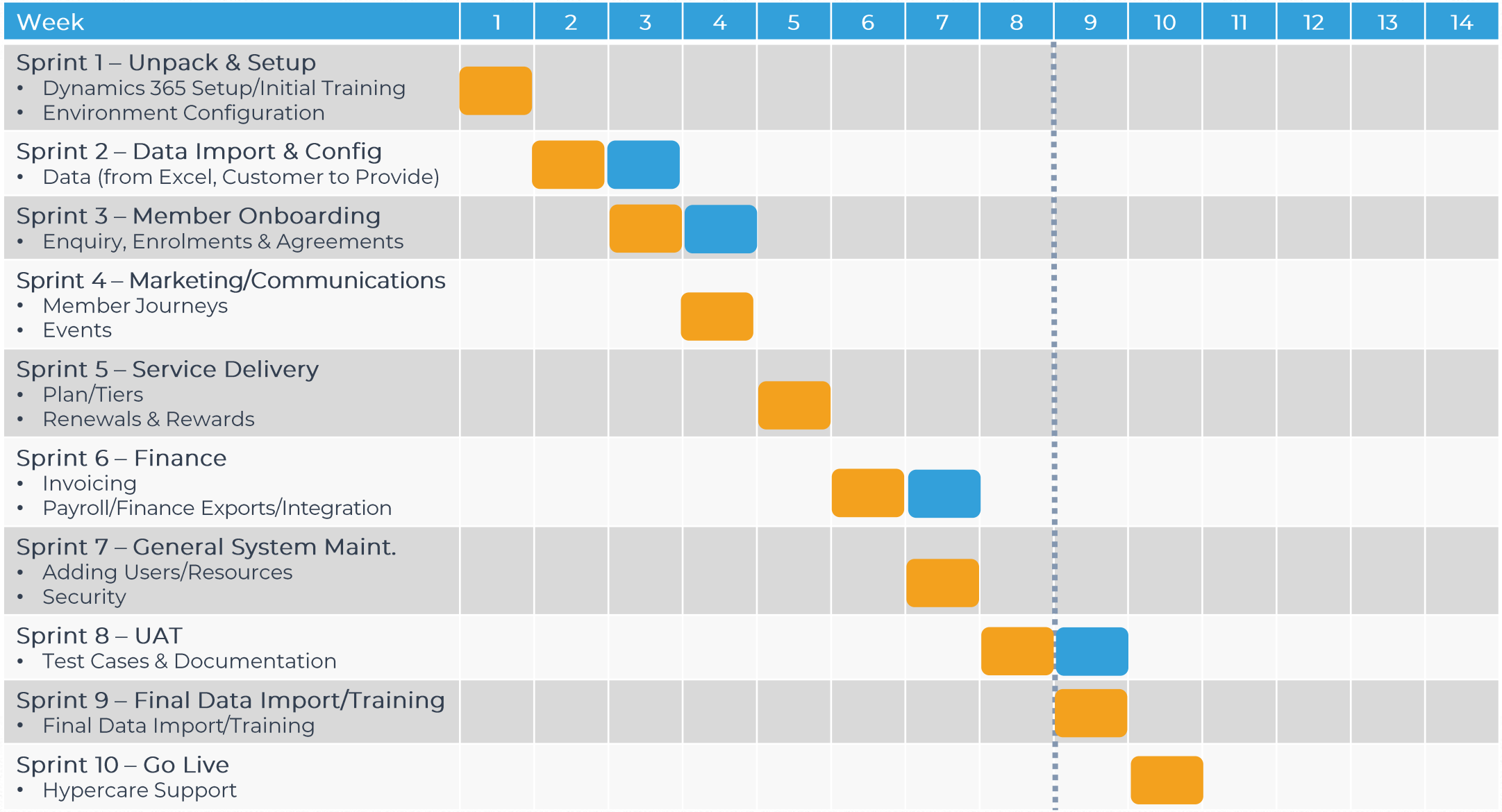

Resources required

	Prior to Start	Week 1 & 2	Week 3 & 4	Week 5 & 6	Weeks 7-10
Core Team					
Wider Team					
d365					

High — Attend meetings with additional work required

Moderate — Attend meetings with some additional work

Low — Attend meetings when needed

Initial Tasks

- Service agreement; licenses; financing
- Implementation checklist

Implementation Tasks (Example)

- Deploy Dynamics 365; assign licenses; install solution; configure setup – document templates etc
- Add users; assign security roles; attend training
- Perform solution playback/s

Change management, training and adoption

Benefits of using the CRP – Conference Room Pilot – methodology include being able to confirm and validate business processes and requirements. There is less change management, quicker “go-lives” and validation of the solution with early review and feedback. A Change Management Lead is typically appointed to work within the Project Team to provide advice in managing changes arising from the project including mitigating risks in plan execution. They need to proactively identify new processes and changes to existing ones, communicating these changes well through necessary training

Training is a great opportunity to help prepare people for change. The more training is provided, the higher the confidence of the users in embracing change and the new system, resulting in less pushback

To support user adoption, listen carefully to what users are asking and trying to achieve while being clear what is within project scope with impact understood. Workarounds, whether temporary or permanent, may need to be implemented

Useful links

Covering important topics of cybersecurity, application technology, audit trail, performance and scalability, availability, reliability, monitoring, UI/UX design and mobile access, support, R&D and legal:

Microsoft Trust Centre: https://www.microsoft.com/en-us/trust-center

Data location: https://www.microsoft.com/en-us/trust-center/privacy/data-location

Security: https://www.microsoft.com/en-us/security/business

Privacy: https://www.microsoft.com/en-us/trust-center/privacy

ISO Reports: https://servicetrust.microsoft.com/ViewPage/MSComplianceGuideV3

Support model

1. Support issues channelled through internal help desk (support co-ordinator)
2. If not resolved internally, log a ticket via d365 customer self-service portal
3. d365 to review/resolve based on priority/max response, resolution time – critical, high, medium, low – 1 to 4 hour, 2 to 8 hour response to resolution
4. Escalation matrix to apply
5. Monthly report produced and review conducted
6. User training, technical and business process issues to be addressed
7. Product enhancements and updates reviewed on a regular basis

Questions and answers

- What are your questions?
- What are your concerns?
- What was not mentioned during this presentation?

For further information, contact:

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