



# Dynamics 365 for HR Management

David Blumentals



“

...at a time when the need for superior talent is increasing, companies are finding it difficult to attract and retain good people.”

“War for Talent”, 1998

# Over 20 years later

Rising employee expectations, wide-spread skills shortages, and intense competition for top talent has made RETENTION a top priority



**27%**

percent of employees who expect HR to check in with them at least quarterly.<sup>1</sup>

**46%**

of employees expect performance feedback at least twice a year.<sup>1</sup>

**32%**

Only 32% of employees said they understand the next steps and actions they need to take to use HR products and services.<sup>2</sup>



**56%**

of typical "hire-to-retire" tasks could be automated with current technologies.<sup>3</sup>

**84%**

of business leaders said they need to rethink their workforce experience.<sup>2</sup>

**88%**

of HR leaders say they need to invest in three or more technologies within the next two years.<sup>2</sup>



# What trends are impacting employee retention today?

Skills shortages



Digital market competition



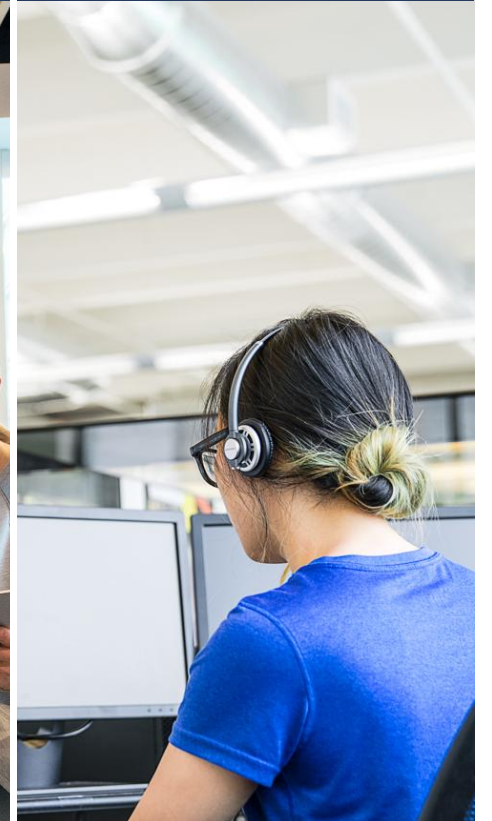
Employee Experience (EX)



Personalization-  
Diversity and  
Inclusion

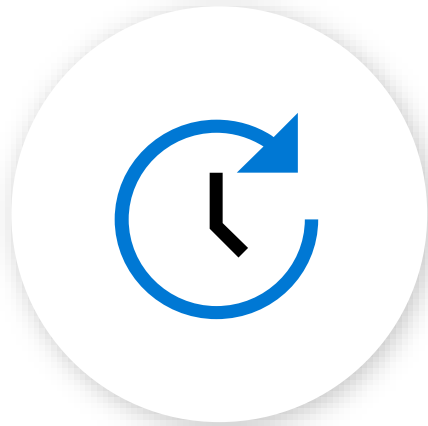


Multi-generational  
workforce



# The key to retention is a *connected employee experience*

Align people to impact



Empower employees



Engage with programs



Continuously innovate



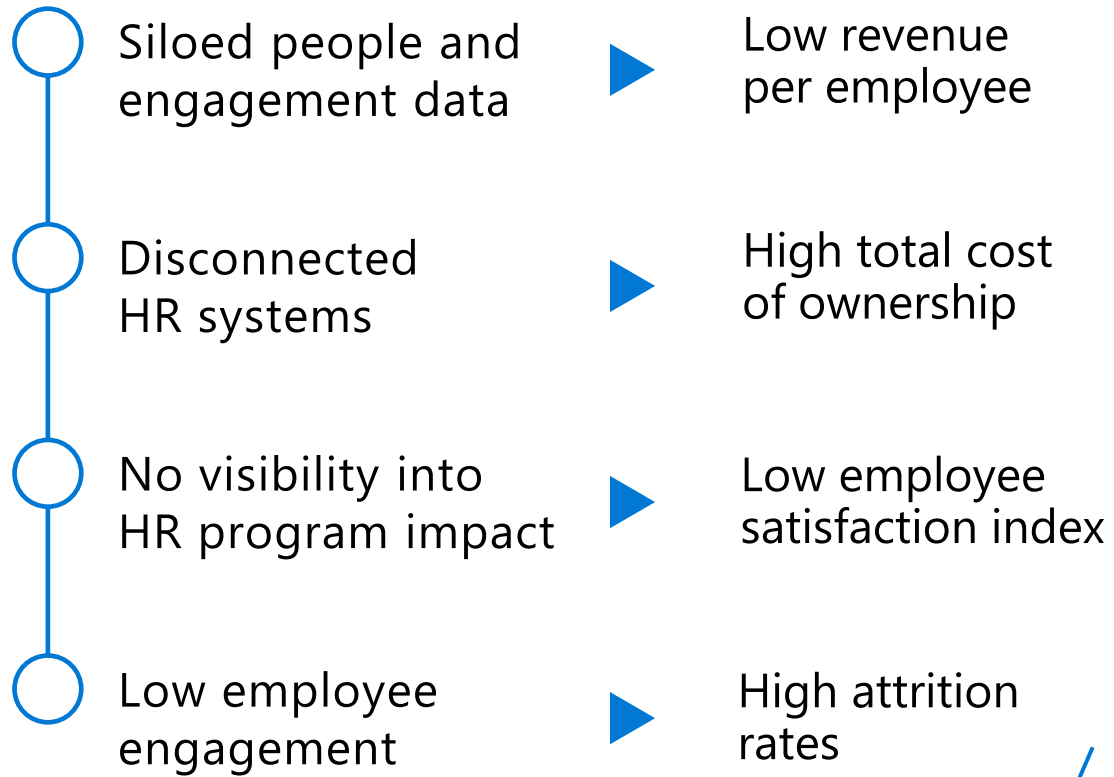
Create the right organizational structure to deliver business results and agilely adjust as expectations change.

Ensure leaders, managers, and employees have visibility, self-service access, development, and collaboration tools.

Create and optimize HR programs that fit a diverse workforce and create a workplace where people can do their best work.

Streamline processes to drive cost-efficiency and adjust programs based on data to deliver sustainable results.

# HR faces complex automation challenges





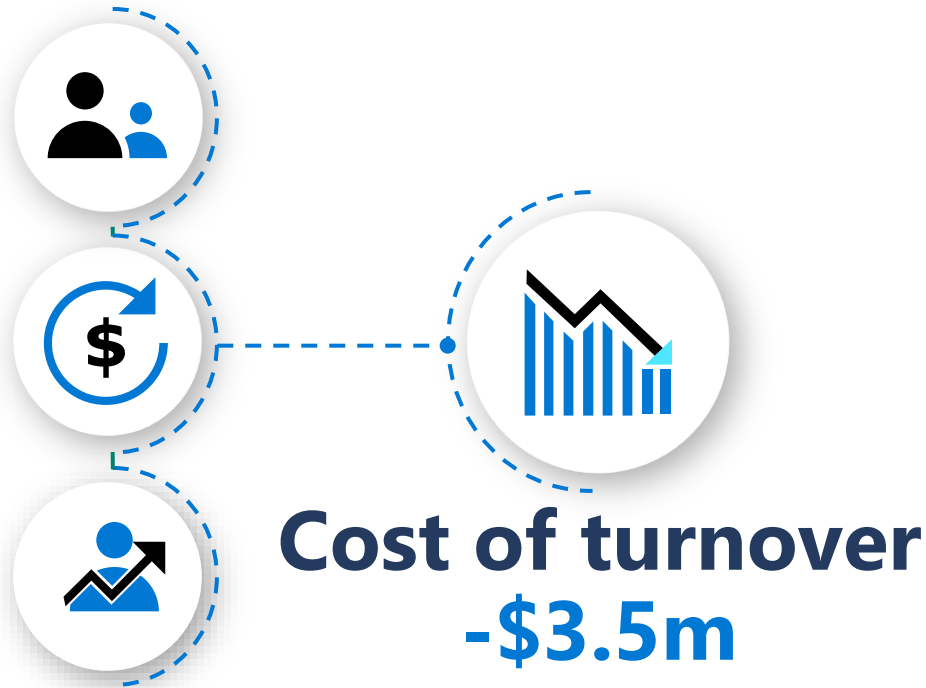
# Employee retention

- 💰 Inefficient HR processes are costly
- 🔲 Data is isolated in silos
- 🔴 Employee experience is disconnected

33% attrition of 100 employees  
= **33 people leaving**

Median salary of 80k  
= **\$26,400**

**+\$80K Salary**  
an employee



The average cost to fill a position is **33%** of an employee's annual salary, yet despite **78%** of companies say digital transformation is important, only **5%** have programs in place

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**Centralize critical people data to create a connected employee experience and improve retention rates**



# NDIS Disability Support & Independent Living (SIL) Specialists

Supporting you to get more out of life

Explore Our Services

## forcare NDIS Disability Support and Independent Living

### Situation

For Care had a variety of systems in place for tracking business performance and employee data, but it was hard to get a holistic view when information was spread across these systems or captured in numerous spreadsheets.

### Solution

For Care deployed Dynamics 365 to modernize HR processes and take better care of their employees—who care for their client participants. For Care adds Microsoft Teams Enterprise for even greater integration of information across the group.

### Impact

For Care can easily track employee achievement, ensure regulatory compliance, and streamline processes that have been manual and time-consuming. These successes have inspired the group to pursue a greater digital transformation that will help For Care provide even better service to clients, leveraging Dynamics 365 for NDIS and Aged Care along with Business Central for finance.

### Products and Services

Products and services:  
Microsoft Dynamics 365 for NDIS and Aged Care  
Microsoft Dynamics 365 for HR Management  
Microsoft Dynamics 365 Business Central  
Employment Hero Payroll/KeyPay

### Organization Size

475 employees

### Industry

Health Provider

### Country

Australia

**“We’re tracking employee achievements better, helping ensure regulatory compliance, and streamlining processes that have been manual for a very long time.”**

**— Human Resources Manager, For Care**

### Resources



<https://d365hr.com/>



# Our vision: Human Resources



## Increase organizational agility

to align employees to impact and thrive through business model changes and digital transformation initiatives.



## Transform employee experiences

to empower people with simplified and personalized self-service experience that work for a diverse workforce.



## Optimize human resources programs

to boost employee engagement and satisfaction, while lowering people operation costs.



## Discover workforce insights

to meet compliance regulations, continuously innovate using data-driven decisions and evangelize HR execution.



Balance operational excellence, organizational agility, and the employee experience to create a workplace where people and the business thrive.

# Dynamics 365 Human Resources

Deliver HR operational excellence to create a workplace where people and the business thrive



# Microsoft Power Platform

Give everyone the ability to create solutions that accelerate business



## Power BI

### Analyze data

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



## Power Automate

### Automate processes

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



## Power Apps

### Build solutions

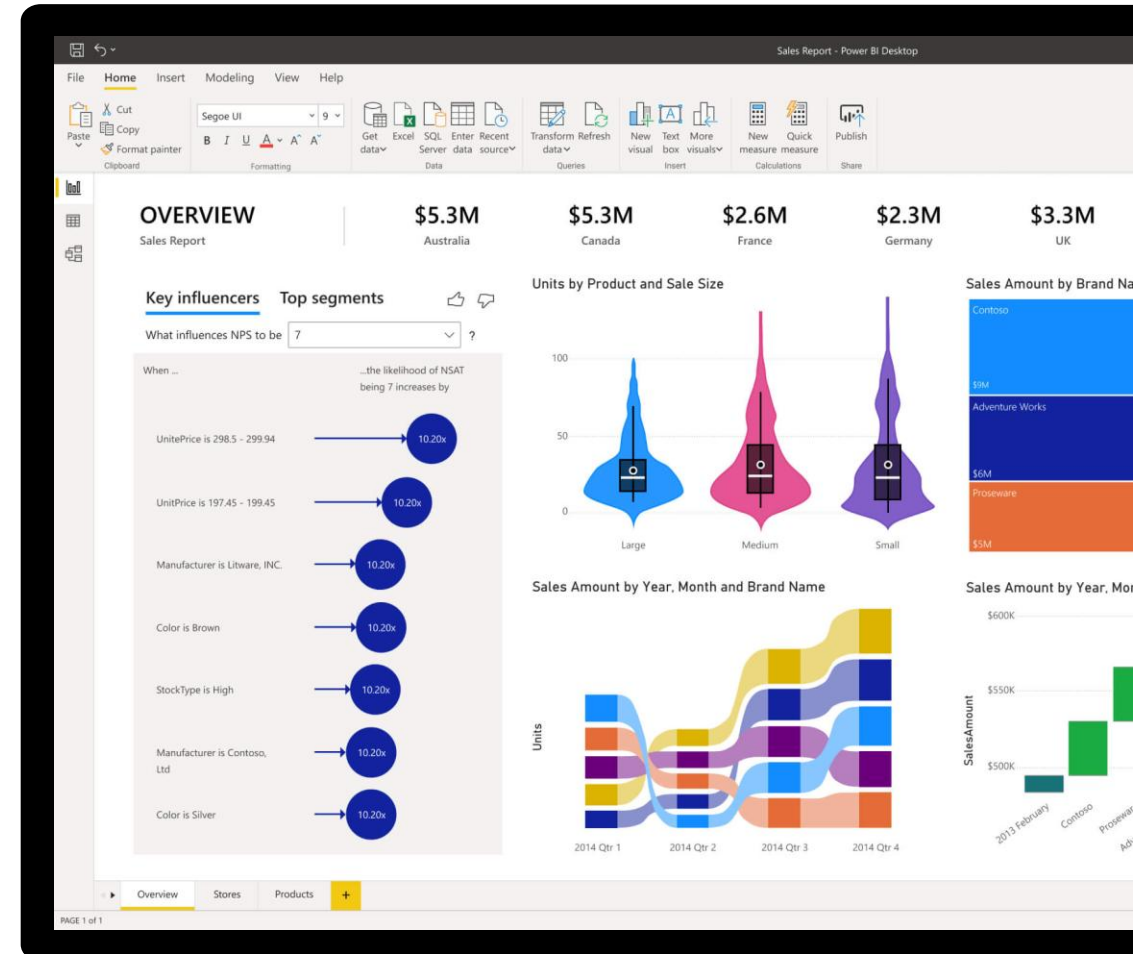
Turn ideas into organizational solutions by enabling everyone to build custom apps that solve business challenges.



## Power Virtual Agents

### Create virtual agents

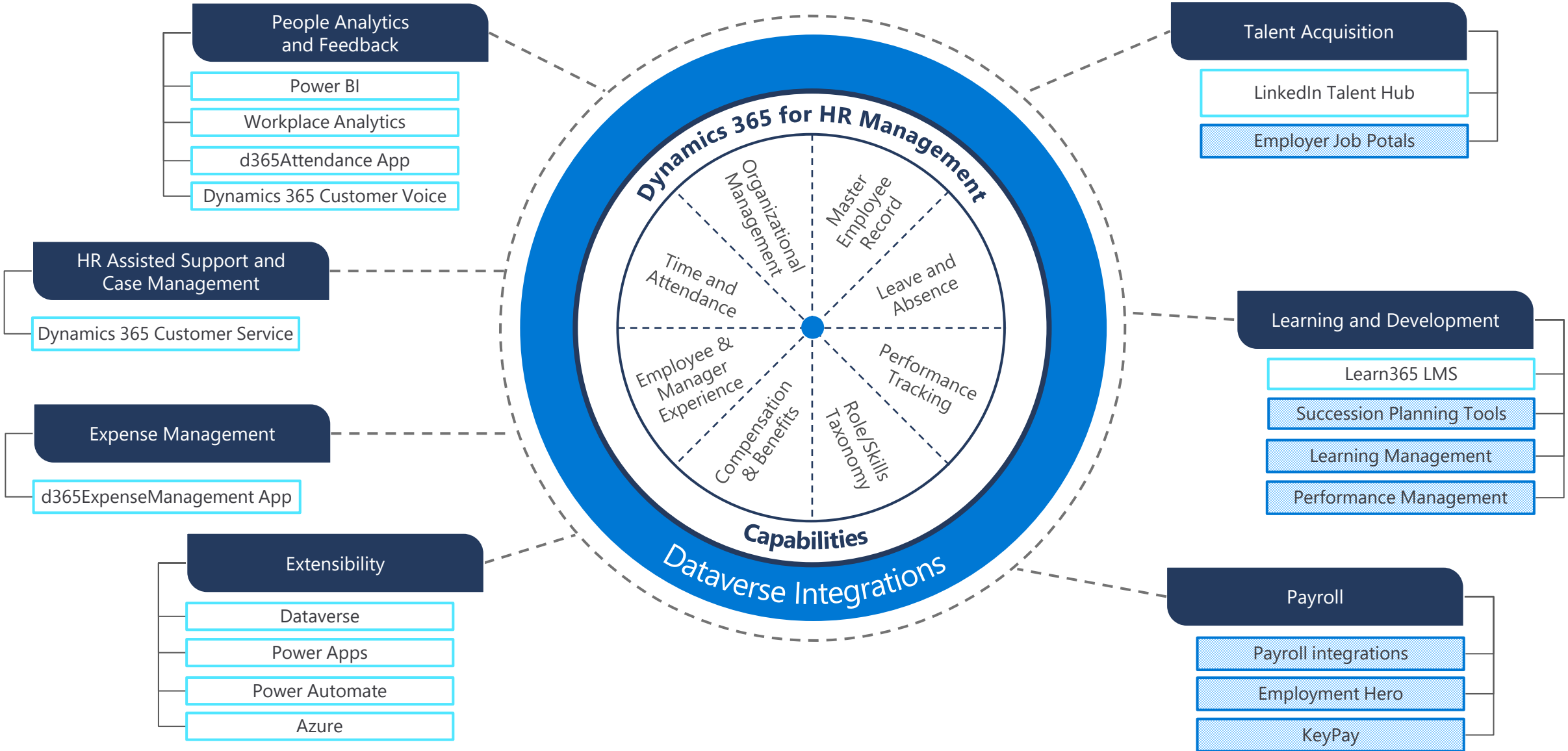
Easily build chatbots to engage conversationally with your customers and employees—no coding required.



# Extensibility ecosystem

Microsoft & d365.Global commercial/ connected offerings

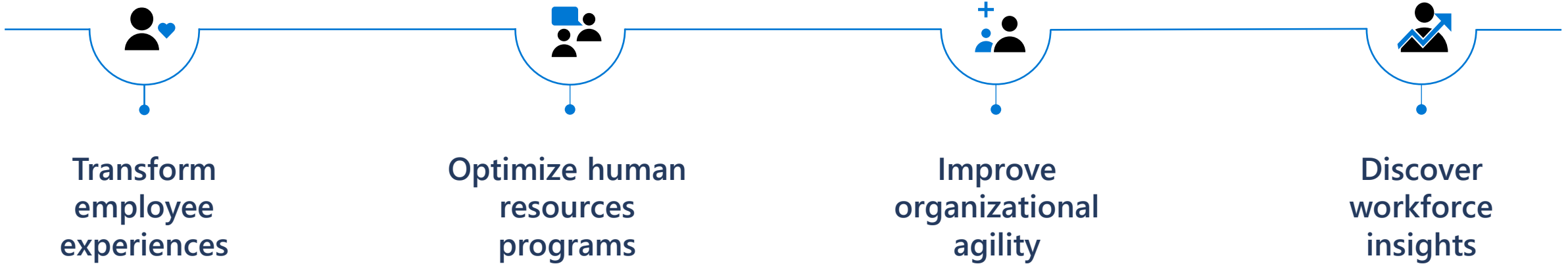
Partner SaaS integrations





# Connected employee experience

## Demo

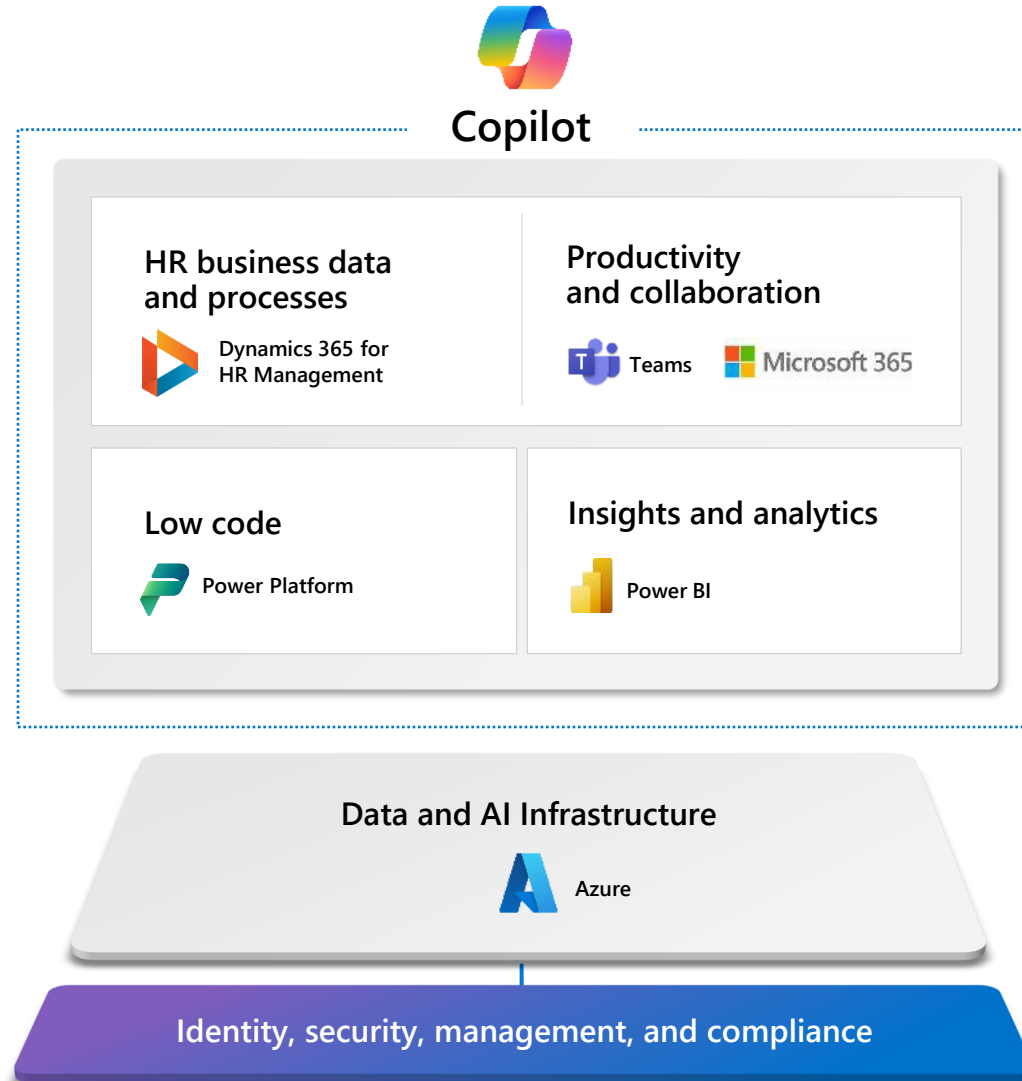


# Dynamics 365 for HR Management

## Out of the box capabilities summary

Organizational management	Employee experience	Compensation and benefits	Leave and absence	Extensibility
Org hierarchy	Microsoft Teams app	Fixed and variable plans	Plans	AppSource
Jobs and positions	Employee Self Serve	Performance	Requests	Dataverse
Employee profile	Manager Self Serve	Benefits	Employee eligibility	Analytics & Power BI
Personnel management	Employee development	Employee enrollment	Contractor eligibility	Power Apps
Task management	Performance reviews			Power Automate
Business process	Goals and skills			Microsoft AI
Compliance	Training and certification			Microsoft Cloud
				d365Attendance
				d365ExpenseMgt

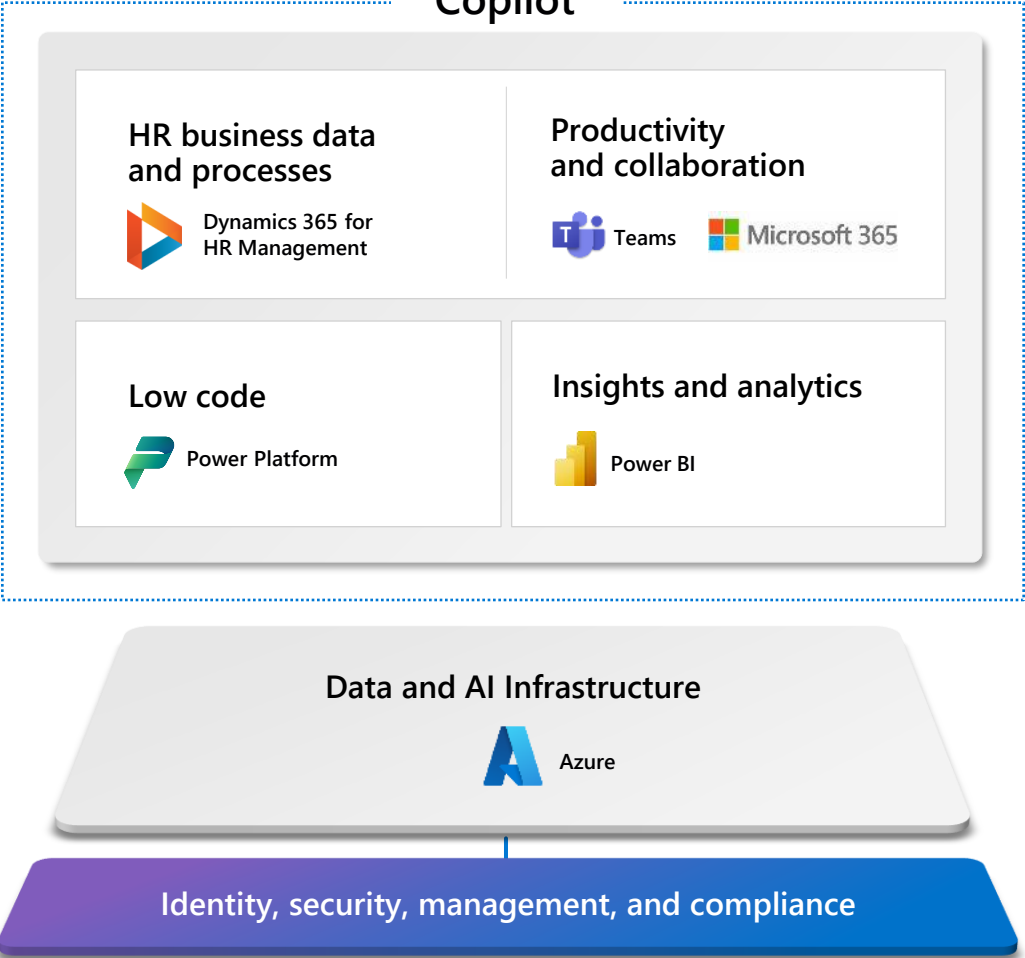
# Microsoft cloud



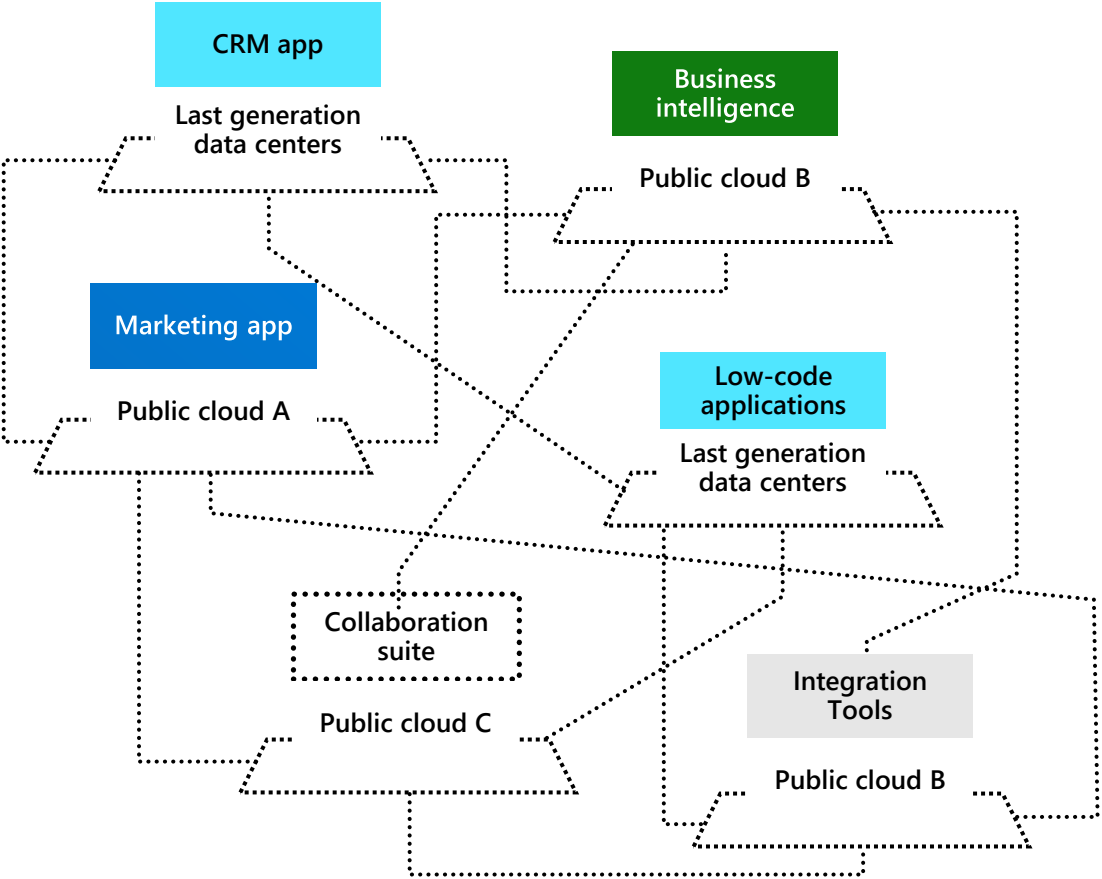
# Microsoft cloud



Copilot



# Our competition





# Digital feedback loop



# Microsoft business applications



# Additional solutions for HR Management



d365Attendance



d365ExpenseMgt



Microsoft 365  
and Teams



Workplace  
Analytics



Azure and  
SharePoint





Learn more | <https://www.d365HR.com>

# Microsoft AppSource

Find the right app for your business needs

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 All  Apps  Categories  Industries  Consulting Services  Partners 

Apps > Human Resource Management for Dynamics 365




## Human Resource Management for Dynamics 365

by d365.Global Pty Ltd

 Dynamics 365 Sales  Dynamics 365 Customer Service  Dynamics 365 Field Service

Contact me

 Save to my list

Overview  Ratings + reviews  Details + support

### Human Resource management for Dynamics 365 Sales, Field Service and Project Operations

**Overview:** The Human Resource Solution is a robust platform designed to empower organizations to efficiently manage the hiring of staff and throughout their employment lifecycle. Whether it is managing leave, expense or deduction requests, performance management, salary management, using the job board to post job vacancies, managing job applications and interviews, hiring employees, inductions/onboarding, terminations, roles and skills management, staff development, training, staff satisfaction surveys, timesheets, approval management and the sharing of knowledge base articles/collateral. This application provides a seamless one-stop solution with integrations to Payroll, Document Management, Email systems enabling you to reach all your HR touch points from one system. In addition, it provides employees with either an online self-management portal or a mobile app on their mobile to manage all their employee related HR processes and procedures.

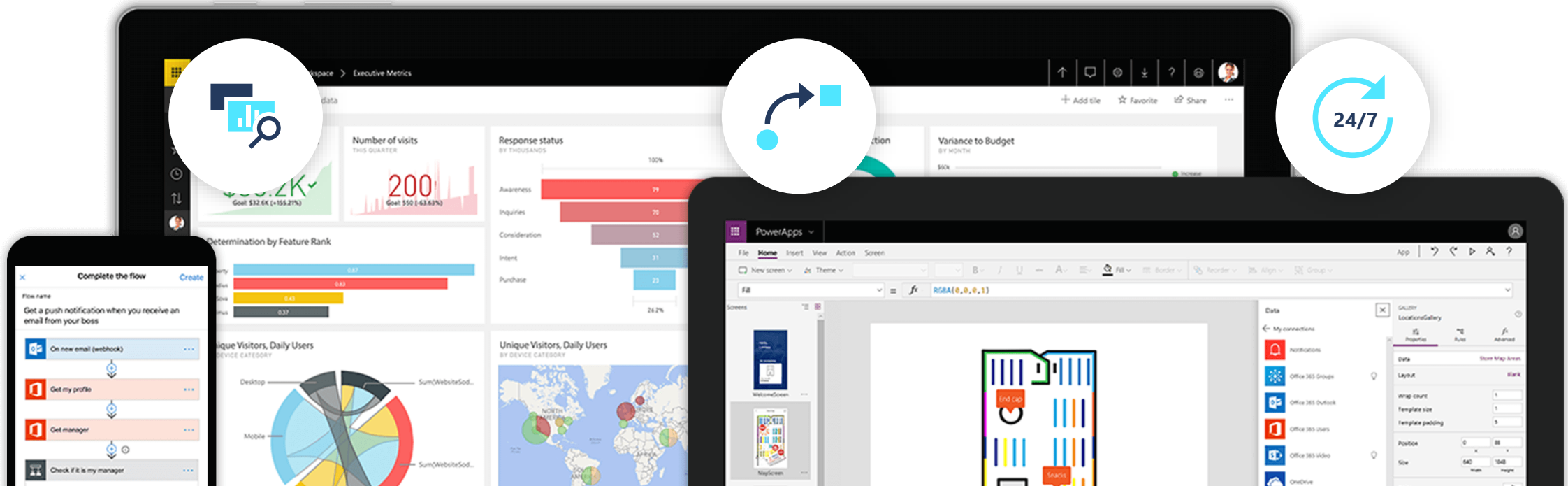
#### Key Features:

- Job Board where employees can apply for jobs online and upload their resume/ cover letter and view their



# Microsoft Power Platform

One connected platform that empowers everyone to innovate



Power platform



Take the next step to connect your  
employee experience

# Understanding business value

Answer  
key questions



Uncover  
hidden benefits



Provide business  
value focus



Why spend?  
Why spend now?  
Appropriate funding?

Qualify benefits  
Align business drivers  
Review financials

Stakeholders' justification  
Auditable business case  
Roadmap to ROI

# Next steps

Envisioning

Technical demo

Proof of concept

Results





# Starting your journey

Assess where your organization is in your journey

Participation of the right stakeholders

Define internal and external outcomes

Start smart, start small





# Thank you



**Appendix – Use these product slides  
when not showing a demo**

# Transform employee experiences

The screenshot displays the Dynamics 365 HR Hub interface for a 'Sandbox' environment. The left-hand navigation pane includes sections for Home, Recent, Pinned, Activities, Dashboard, Recruitment, Hiring, Vacancies, Applicants, Interviews, Administration, Employees, Inductions, Document Library, Compensation And Expenses, Compensations, Benefit, Travel Requests, Claims, Advance Requests, Budgeting, and Learning. The main content area is titled 'Wendy Rose - Saved Bookable Resource' and features a 'Form assist' button. The profile is organized into several tabs: General, Personal Details (selected), Tax and Bank Details, Employee Assignments, Onboarding and Induction tasks, Work Hours, Benefits, Travel Requests, Advance Requests, Claims, and more. The 'Personal Details' tab is expanded, showing fields for Employee Photo, Salutation (Ms), First Name (Wendy), Middle Name, Last Name (Rose), Gender (Female), Marital Status, Spouse, Number Of Children, Date of Birth (09/09/1980), Age (44), Are you an Australian Citizen? (Yes), Citizenship, Social Details, and Facebook Profile. To the right of these fields are sections for Contact Details (Mobile, Home, Business, Work, Email), Residential Address (Street, City, State, ZIP/Postal Code, Country), Emergency Contact 1 Details, Emergency Contact 2 Details, Postal Address, and Emergency Contact 3 Details.

The screenshot shows a Microsoft Teams chat window titled 'Human Resources'. The chat history includes a message from 'Human Resources' at 9:15 AM stating, 'Here's what I found for your balances. For more details about a specific leave type, try typing "View vacation balance details".' Below this is a list of balances: PTO (87.76 hours), Sick (16 hours), Bereavement (0 hours), and Vacation (70.09 hours). A subsequent message from the same contact at 9:15 AM says, 'I want to take PTO time off next Thursday through Friday'. A third message from 'Human Resources' at 9:15 AM responds, 'It looks like you want to take PTO leave.' Below this is a 'New PTO request details' card showing the request period from Thursday, Feb 18, 2021, to Friday, Feb 19, 2021, with 87.76 hours available. The card includes a 'Request time off' button and a 'Show more' link. At the bottom of the chat window is a text input field with the placeholder 'Type your questions here' and a list of icons for various actions.

Foster employee connections with rich employee profiles that showcase career success and are easy to find.

Empower managers with team insights and process workflows—helping them take better care of people.

Enable self-service HR tools for employees including a Microsoft Teams integration that allows employees to manage time-off.

# Optimize HR programs

The screenshot displays the Dynamics 365 HR Hub interface in a 'SANDBOX' environment. The left-hand navigation pane lists various HR modules including Home, Recent, Pinned, Activities, Dashboard, Recruitment, Hiring, Vacancies, Applicants, Interviews, Administration, Employees, Inductions, Document Library, Compensation And Expenses, and Human Resources. The main content area is titled 'Teller - Level 1 - Saved' and shows a 'Compensation' form. The 'General' tab is active, displaying fields for Name (Teller - Level 1), Gross Amount (RM100,000.00), Last updated (18/08/2025 11:26), and Currency (Ringgit Malaysia). A 'Form assist' button is visible in the top right corner of the form area.

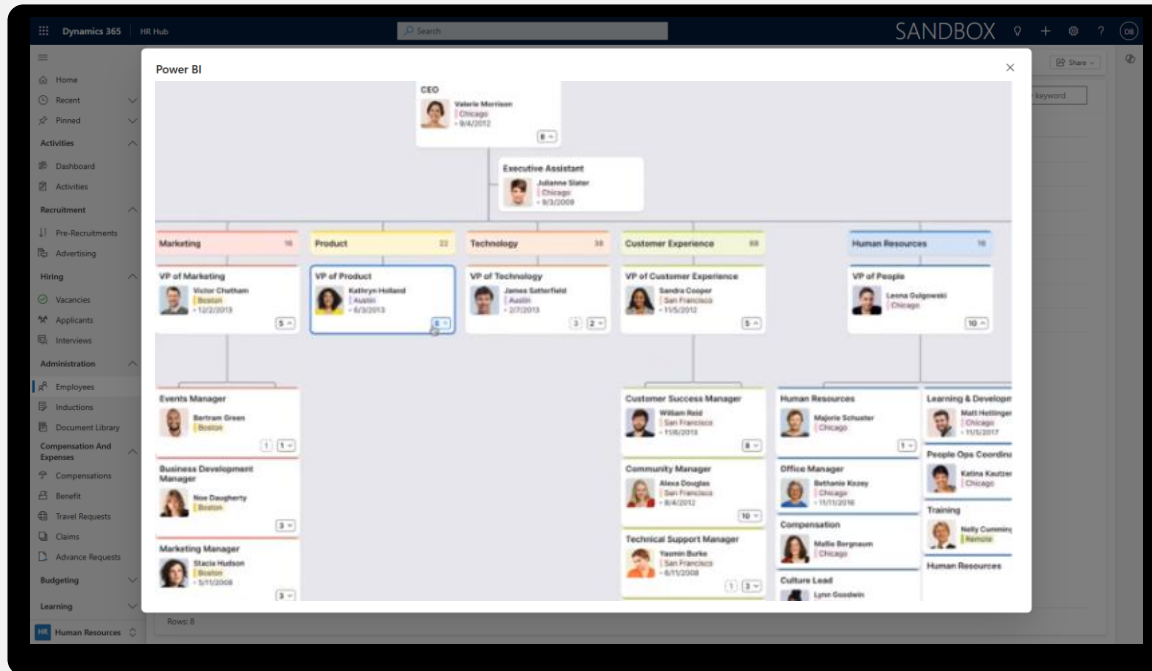
Create complex compensation programs that meet the needs of a diverse workforce.

The screenshot displays the Dynamics 365 HR Hub interface in a 'SANDBOX' environment. The left-hand navigation pane is identical to the previous screenshot. The main content area is titled 'New Benefit' and shows a 'Benefit' form. The 'General' tab is active, displaying fields for Benefit ID, Employee, Type, Provider, Start Date, End Date, Currency (Pound Sterling), Limit Amount, Benefit Frequency, Benefit status (Pending), and Description. A 'Form assist' button is visible in the top right corner of the form area.

Simplify leave and absence programs, while meeting changing global regulations.

Redefine benefits administration with flexible and configurable programs.

# Increase organizational agility



The screenshot shows a Microsoft Teams chat window. The chat is titled 'Human Resources' and has a message from 'Human Resources' at 9:15 AM: 'Here's what I found for your balances. For more details about a specific leave type, try typing "View vacation balance details".' A form titled 'Human Resources' is open, titled 'Requesting for time off'. The form has a 'Balances' section with a dropdown for 'PTO'. It shows 'Available' as 87.76 hours, 'Requested' as 16 hours, and 'Remaining' as 71.76 hours. There is a 'Reason code' dropdown and a 'Comment' field with the text 'Taking time off to go on a ski trip'. The 'Dates' section has 'Start date' as 'Thu, Feb 18, 2021' and 'End date' as 'Fri, Feb 19, 2021', both with 'PTD' (Paid Time Off) selected. There are 'Hours' dropdowns for each date, both set to 8. There is an 'Attachments' section with an 'Add attachment' button. At the bottom are 'Submit', 'Save as draft', and 'Cancel' buttons. Below the form, there is a message from 'Human Resources' at 9:15 AM: 'To edit details and complete your request, select "Request time off".' It shows '87.76 hours available' and a 'Show more' link. There is also a 'Requesting time off' button. At the bottom of the chat is a 'Type your questions here' input field.

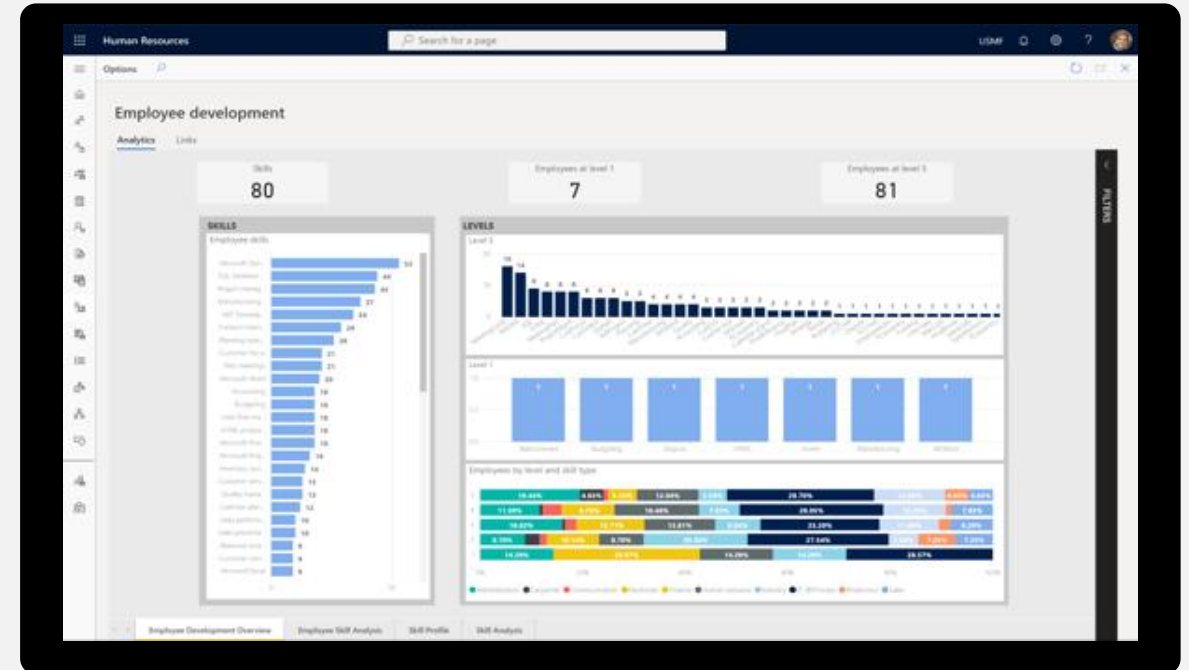
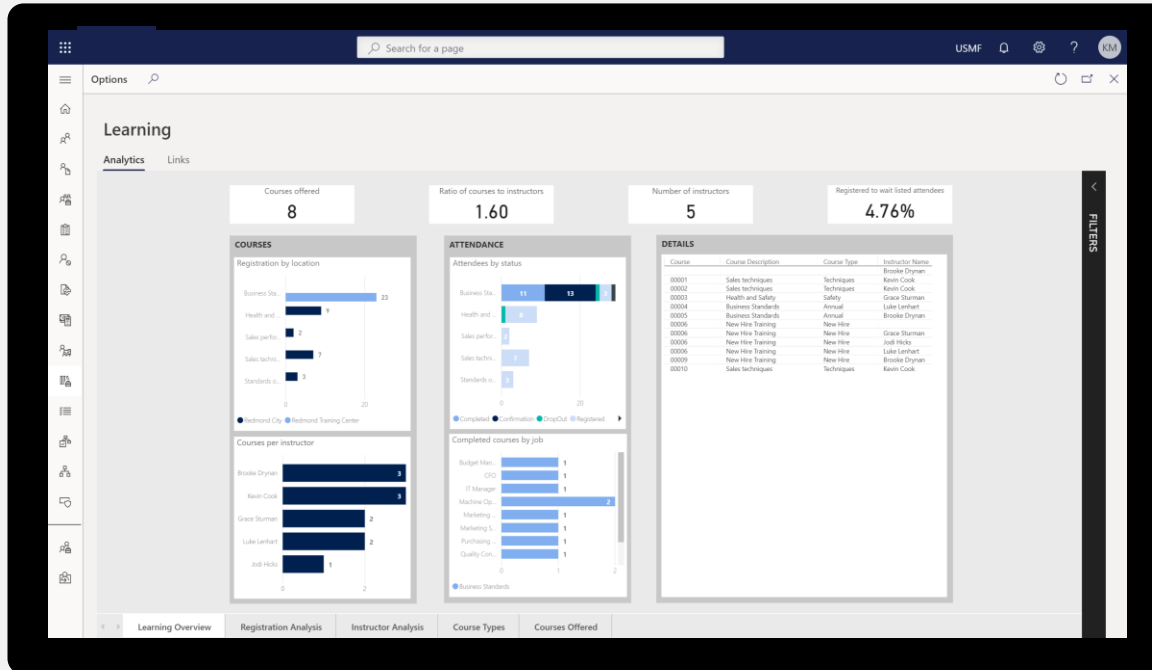
Reduce organizational complexity with a structure, hierarchy, and role management.

Improve productivity and efficiency with automated processes, workflows, and task management.

Integrate with other best-of-breed HR solutions to build an HCM ecosystem that best suits your needs.



# Discover workforce insights



Make decisions confidently using embedded analytics that help you analyze HR programs.

Improve workforce planning with rich dashboards by adding on Microsoft Power BI.

Ensure the best possible EX by capturing employee sentiment with Microsoft Forms Pro.

# Appendix – Payroll integrations

# Why Employment Hero Payroll/KeyPay?

First global payroll provider for Dynamics 365 for HR Management with seamless integration—delivering a smooth user experience

Best of breed payroll and tax functionality

Global HR and Payroll report from directly inside Dynamics 365



# Appendix – Additional statistics

# Transform Employee Experiences

32%



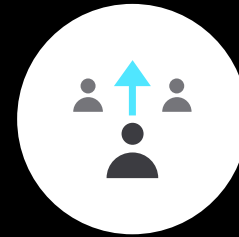
of employees said they understand the next steps and actions they need to take to use HR products and services.<sup>1</sup>

84%



of business leaders said they need to rethink their workforce experience.<sup>2</sup>

66%



of HR leaders believe that EX is the most transformative priority for the workplace.<sup>3</sup>

46%



of employees expect performance feedback at least twice a year.<sup>4</sup>

1. Deloitte 2019
2. Deloitte 2019
3. HR Trends Report, Microsoft 2019
4. Harris Poll, 2018



# Optimize HR Programs

56%



of typical “hire-to-retire” tasks could be automated with current technologies.<sup>1</sup>

88%



of HR leaders say they need to invest in three or more technologies within the next two years.<sup>2</sup>

84%



of HR leaders agree that it is critical to understand the relative performance of their employees.<sup>3</sup>

21%



of annual pay, on average, is the cost to replace an employee who quits.<sup>4</sup>

1. McKinsey 2018
2. Deloitte 2019
3. HR Trends Report, Microsoft 2019
4. [Harvard Business Review](#), March 6, 2017

# Facilitate Organization Agility

92%



Of executives rate organizational redesign as a critical priority.<sup>1</sup>

67%



of job seekers said that a diverse workforce is an important factor when evaluating companies.<sup>2</sup>

87%



Of employees who report to team leaders who have at least three key inclusiveness traits feel welcome and included in their team.<sup>3</sup>

1. Bersin and associates
2. "What Job Seekers Really Think of Your Diversity Stats," Glassdoor, November 17, 2014.
- 3.

# Enable Workforce Insights

27%



Annual growth on average  
for insight-driven  
companies.<sup>1</sup>

70%



of companies consider  
people analytics to be a  
high priority.<sup>2</sup>

60%



Of collected data is never  
successfully used for any  
strategic purpose.<sup>3</sup>

1. [Forrester](#)
2. Paul Leonardi and Noshir Contractor, "[Better People Analytics: Measure Who They Know, Not Just Who They Are.](#)" *Harvard Business Review*, November/ December 2018.
3. [Forrester](#)