Dynamics 365 Migration Program
Partner-led migration assessment offer

October 29, 2020

Meeting recording and deck will be made available on MPN
Peter Jensen
Director Business Strategy for Partners
Topics

• Dynamics 365 Migration Program introduction
• Partner-led migration assessment offer overview
• Next steps & resources
Dynamics 365 Migration Program introduction
Why is a migration program needed now?

- Customers at crossroads; Cloud or On-Premises?
- Competition is actively targeting our installed base
- Help partners build migration pipeline and technical skills
Customers have voiced their migration concerns

We are looking for a one-stop migration approach that brings together all the elements with prescriptive, best practice guidance.

I don’t understand how to transition to SAAS licensing and use migration offers.

Can we take our customizations to the cloud?

What is the value of cloud?

What are the benefits of Dynamics 365?

Is cloud secure?
What is Dynamics 365 Migration Program?

Available to all Dynamics AX & Dynamics CRM customers

- **Connect with Microsoft**
- **Get a no-charge, no obligation Microsoft Assessment**
- **Work with Partner on the next steps**

- The [Dynamics 365 Migration Program](#) is a Microsoft-led SMA motion (not available to Public Sector accounts)
- **NOTE** - Qualified partner nominations for the partner-led offer will not be contacted by Microsoft under the Dynamics 365 Migration Program until the final delivery deadline of the offer (90 days post PO approval)
Partner-led migration assessment offer overview
Partner-led Migration Assessment offer overview

Migration assessment

A no-charge* SMA offer ($5k) or AMA offer (up to $20k) globally available through active Gold and Silver cloud business application competency partners

Microsoft Dynamics AX and Dynamics CRM customers with $0 (zero) Finance and Operations or Customer Engagement Dynamics 365 pipeline with an estimated $60k (USD) or greater Dynamics 365 Microsoft Annual Revenue (ACV subject to Microsoft review)

Target customers (eligibility)

Partners must commit to delivering the SMA or AMA scope of the functional and technical assessments outlined in the handouts (request deadline is December 31st, delivery deadline is 90 days after PO approval)

<table>
<thead>
<tr>
<th>Payout scale</th>
<th>Minimum Threshold</th>
<th>ROI</th>
<th>Work scope</th>
<th>Payout</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$60K (USD)</td>
<td>12X</td>
<td>SMA</td>
<td>$5k (fixed)</td>
</tr>
<tr>
<td></td>
<td>$60K (USD)</td>
<td>12X</td>
<td>AMA</td>
<td>Over $5k up to $20k (sliding scale**)</td>
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</tbody>
</table>

**Examples of sliding scale**
- Deal size below $60K, not eligible
- Deal size $60K, payout $5K
- Deal size $120K, payout $10K
- Deal size $240K, payout $20K
- Deal size over $240K, payout $20K

*SMA: Standard Migration Assessment
AMA: Advanced Migration Assessment

*No-charge offer is available until funds are depleted
Two types of DMP partner-led assessments

**Standard Migration Assessment (SMA)**
- Current build version
- Models installed
- Modification level
- Code upgrade - time investment
- ISV solution overview
- Localizations solution overview
- Customization assessments
- Forms refactoring
- Integration assessments
- Data migration/upgrade assessments
- Reporting and BI assessments
- Retail/Supply-Chain assessment

**Advanced Migration Assessment (AMA)**

Select 2 at least:
- Business Value Insights (BVI)
- Deprecation plan
- Envisioning
- Functional assessments
- Industry accelerators
- Industry best practices
- Integration options
- Migration plan
- Proof of Concept
- Reporting

All SMA components +

Review the SMA (AX | CRM) and AMA handouts for more details
The below process guidance is for customers nominated prior to the nomination deadline for this offer (Dec. 31st).

- Partner identifies potential migration assessment opportunity
- Partner indicates possible migration assessment with customer and receives approval to share contact information
- Partner submits completed offline ECIF request form and Work Scope to D365SMA alias
- Microsoft qualifies nomination against offer thresholds. Standard ECIF policy applies
- Microsoft communicates IO & PO approval via official ECIF communications. PO approval occurs 15–20 business days after IO approval.
- Partner delivers migration assessment. Once delivered, partner completes steps outlined in PO approval notice to receive payment

- Partner agrees to complete migration assessment training prior to delivery. Training materials shared upon ECIF request submission
- ECIF/IO approval does not indicate PO approval (note – PO approval occurs 15 - 20 business days after IO approval)
ECIF guidance - partner-led migration assessment

Below ECIF guidance is for customers nominated prior to the nomination deadline for the partner-led migration assessment offer.

**When to request ECIF for SMA?**
- Submit your ECIF requests after receiving customer approval to share their contact information.

**How to request ECIF for SMA?**
- Complete the ECIF request form & work scope document and email them to D365SMA@microsoft.com.
- You will have 90 days to deliver the assessment from the date your PO is approved. Do not start work until PO approval.

**How long does an ECIF request take?**
- ECIF requests can take up to 15 business days for initial processing. Please allow up to 20 business days for a PO to be approved.

**Don’t have an ECIF vendor account?**
- To setup a vendor account prior to submitting an ECIF request please reach out to ecifspmo@microsoft.com.

**ECIF guidelines**

**Standard ECIF rules apply for migration assessment requests**
- Reviewed on a case by case basis by a combination of Microsoft team members
- All requests require a work scope document
- **Supplier (Partner) must be ECIF Approved in country where work is being performed.** If you are not ECIF approved allow 4-6 weeks to complete the approval process with the supplier onboarding team prior to PO approval. Reach the supplier onboarding team here: ecifspmo@microsoft.com

**ECIF Specific Questions? D365ECIF@Microsoft.com**

Although you may submit an ECIF request for this offer this does not indicate that ECIF has been or will be approved. As always, be sure to wait for an official ECIF communication that your ECIF request has been approved and your PO has been created and approved prior to starting any SMA work with your customer.

- Funds can be utilized for customers that have made Dynamics 365 cloud license purchases but have not yet initiated a migration to the cloud from their Dynamics AX or Dynamics CRM on-premises deployments.
- ROI for these deployments would be based on the current ACV for customers that have licenses.
Next steps & resources
Next steps

**Next Steps**

- Submit completed ECIF request form & work scope document **by December 31, 2020** to the [D365SMA@Microsoft.com](mailto:D365SMA@Microsoft.com) alias
- Review next steps outlined in the ECIF request confirmation email

**Deadlines**

- **Request Deadline**: December 31, 2020
- **SMA Delivery Deadline**: 90 days from PO approval

Questions? [D365SMA@Microsoft.com](mailto:D365SMA@Microsoft.com)
Dynamics AX partner resources

Dynamics 365 Migration Program partner offer

- MPN page (web)
- Standard Migration Assessment (SMA)
  - Handout (PDF)
  - Framework (PDF)
  - Work scope (Word)
- Advanced Migration Assessment (AMA)
  - Handout (PDF)
  - Work scope (Word)
- ECIF request form (Excel)

Customer evidence

- Evidence Disc. Manuf. – Wahl Clipper Corporation (video)
- Evidence Distrib. - Copper Bolt & Nut (video)
- Evidence Disc. Manuf. - Winner Imports (study)
- Evidence Retail - Sonee Sports (video + study)
- Evidence Energy – Gasum (study)
- Dynamics 365 customer momentum 2019 (video)

Guidance

- Dynamics 365 Migration Program MPN page (web)
- Dynamics 365 Migration Program docs page (web)
- Partner incentives (web)
- On-premises to online transition guidance (PDF)
- Modernize Finance and Operations Sales Play Assets
  - Mod. Fin. and Operations Sales Play Card (PPT)
  - Mod. Fin. and Operations Sales Play Overview (PPT)
  - Mod. Fin. And Operations Sales Play Pitch Deck (PPT)
- Finance GTM and Operations GTM resources on MPN

Cloud migration benefits

- Business value of migrating from Dynamics AX to the cloud (video)
- Forrester TEI – Migrating from Dynamics AX to the cloud
  - Full study (PDF) and infographic (PDF)
- MSFT – Top 5 benefits of moving to the cloud (PDF)
- MSFT – On-premise to cloud migration (Web)
- IDC – Journey to enterprise cloud ERP (PDF)
- EAC – Microsoft ERP differentiators (PDF)
- Dynamics 365 Finance (video)
- Dynamics 365 Supply Chain Management (video)
- Dynamics 365 Modern Adaptable Platform (video)
- Dynamics 365 Evergreen SaaS ERP for CIO (video)
- Dynamics 365 Finance To Drive Growth for CFO (video)
- Dynamics 365 SCM To Optimize Ops for COO (video)
Dynamics CRM partner resources

Dynamics 365 Migration Program partner offer

- MPN page (web)
- Standard Migration Assessment (SMA)
  - Handout (PDF)
  - Framework (PDF)
  - Work scope (Word)
- Advanced Migration Assessment (AMA)
  - Handout (PDF)
  - Work scope (Word)
  - ECIF request form (Excel)

Customer evidence

- Evidence Travel & Transportation – Apollo (study)
- Evidence Travel – Travel Counsellors. (video)
- Dynamics 365 customer momentum 2019 (video)

Guidance

- Dynamics 365 Migration Program MPN page (web)
- Dynamics 365 Migration Program docs page (web)
- Partner incentives (web)
- On-premises to online transition guidance (PDF)
- Dynamics 365 Customer Engagement sales play & product assets:
  - Intelligent sales & marketing
  - Connected field service
  - Proactive customer service
  - Customer insights

Cloud migration benefits

- Business value of migrating from Dynamics CRM to the cloud (video)
- Forrester TEI – Migrating from Dynamics CRM to the cloud (PDF)
- MSFT – Top 5 benefits of moving to the cloud (PDF)
- MSFT – On-premise to cloud migration (Web)
### Component Descriptions

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Value Insights (BVI)</strong></td>
<td>BVI assessment is a way of understanding the total economic impact that a customer would realize by moving to the cloud. Performing a BVI will help uncover potential cost-savings and productivity gains establishing a compelling economic reason to migrate to the cloud. This will also help the customer to align migration efforts with business outcomes.</td>
</tr>
<tr>
<td><strong>Deprecation plan</strong></td>
<td>With the rapid pace of innovation there are often items on-premises which are no longer available when moving to Dynamics 365 online. Deprecation planning assesses those key items that will be affected going to the cloud and offers recommendations, best practices and alternative solutions that a customer should consider.</td>
</tr>
<tr>
<td><strong>Envisioning</strong></td>
<td>Conducting an envisioning workshop is a great way to generate ideas and ensure all the key stakeholders on the migration project are heard. A design thinking workshop can help form a prioritized list of requirements that can be used in the design and help shape future phases of digital transformation.</td>
</tr>
<tr>
<td><strong>Functional assessments</strong></td>
<td>A customer’s business process may have changed over the lifecycle of their Dynamics on-premises deployment. This means that the existing system processes today might not be the best fit for an online deployment. This analysis drills into the most important functional requirements and re-evaluates them with best practices and recommendations for Dynamics 365.</td>
</tr>
<tr>
<td><strong>Industry accelerators</strong></td>
<td>Microsoft industry accelerators/3rd party templates can help with time to value on Dynamics 365 cloud migrations. If there is a particular vertical solution that addresses a known functionality gap, then this analysis can help in exploring potential use case scenarios post migration.</td>
</tr>
<tr>
<td><strong>Industry best practices</strong></td>
<td>What a customer might know and rely on in the on-premises world may no longer apply when moving to the cloud. Based on the results of the assessment, there may be specific areas which warrant further response, this item is an opportunity to expand on industry best practices, especially as it relates to functional and technical elements of Dynamics 365 online.</td>
</tr>
<tr>
<td><strong>Integration options</strong></td>
<td>Existing integrations running on-premises may no longer run when migrating to the cloud or may no longer be needed. Dynamics 365 is a cloud solution built on the latest technologies and industry standards. The goal here is to assess those existing integrations for cloud compatibility, security, technical feasibility, and performance.</td>
</tr>
<tr>
<td><strong>Migration plan</strong></td>
<td>The effort here is to understand what a future state deployment of Dynamics 365 might look like and produce a high-level system blueprint. This might include items such as conceptual solution architecture, high level gap-fit by business processes, integration strategy, data migration strategy and/or deployment strategy.</td>
</tr>
<tr>
<td><strong>Proof of Concept</strong></td>
<td>Working with the customer to build out a limited scope proof of concept (demo) using Dynamics 365. The idea being the customer can get hands on with the solution, prove value and see the desired end results.</td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>This item makes recommendations on reporting options for Dynamics 365 online. Examples include detailed reporting and Business Intelligence assessment broken down by – operation reporting, financial reporting, business document reporting and analytical reporting. Recommendations could also include other reporting options with the latest technology including – Power BI, Power Automate &amp; Azure Data Lake service integration.</td>
</tr>
</tbody>
</table>
Q&A
Thank you
## FY21 To-Partner offers – specific activities

<table>
<thead>
<tr>
<th>Sales Play*</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activate Digital Selling</strong></td>
<td><strong>Enable Always-On Service</strong></td>
<td><strong>Build a Resilient Supply Chain</strong></td>
<td><strong>Manage Financial Risk and Reduce Fraud</strong></td>
<td><strong>Build Agile Business Processes</strong></td>
<td><strong>Generate Value with Proactive Insights</strong></td>
<td></td>
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</table>

**Partner Offer 1**

**Catalyst Accelerator Pre-sales**
12x ROI*, max $10k

- **Offer 2**
  - 1:1 Commerce-in-a-day
  - 1:1 Customer Insights-in-a-day
  - Activate Digital Selling Pilot

**Partner Offer 2**

**Proof of Value**
$2k - $3.5k

- **Offer 2**
  - 1:1 App-in-a-day
  - Build Agile Business Processes Pilot

### Conversation Starters & HERO Products

|----------------------|-------|---------------|----------|-----------|------------------|-----------------|----------------|--------------|------------------|----------------------|-----------------------------|----------|-----------------|---------|------------|---------------|----------------------|---------|

### Offer Resources:

- **Microsoft Partner Community**

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*ROI calculations based on Annual (12 month) license values for Dynamics 365 (Sales Play 1,2,3,4) at 12x ROI and Power Platform (Sales Play 5,6) at 10x ROI

Minimum deal sizes are required to claim any of these offers - $50k annual license value for Dynamics 365 and $30k annual license value for Power Platform, drops to $20k for Customer Insights Opportunities involving CSP licensing are eligible in FY21 except in Tier 1 high risk countries. Please connect with your Microsoft contact to know if your country of operation is eligible to receive funding for CSP licensing opportunities.

Questions? D365ECIF@microsoft.com
Activate Digital Selling empowers organizations to provide an end-to-end digital buying experience, across every stage of the customer's journey, making it quick for customers to evaluate and buy without the need for face-to-face engagements.

Enable Always-On Service empowers teams with the right tools and insight into a 360-degree view of the customer profile, sentiment analysis, and omnichannel engagement, to provide a personalized response across any channel.

Build a Resilient Supply Chain offers organizations with end-to-end supply chain visibility and agility in planning, sourcing, and distribution processes so they can adapt to disruptions quickly and ensure business continuity.

Reduce Fraud enables organizations to predict future cash flow trends and minimize loss due to payment fraud or wrongful rejections, helping to optimize financial operations and protect revenue.

Build Agile Business Processes allows organizations to modernize, automate, and innovate faster to eliminate inefficiencies and solve challenges across any part of the business.

Generating Value with Proactive Insights enables organizations to unify and unlock more value from their data, in order to drive greater business insights and activate recommendations with AI.

Partners Apply Here

Partners must provide qualifying MSX opportunity ID to reflect expected or actual return.

ROI calculations based on Annual Contract Value (ACV) – Dynamics - 12x ROI; Power Platform - 10x ROI

Only customer opportunities with an MSX opportunity ID qualify.

Questions? D365ECIF@microsoft.com

Offer Resources: Microsoft Partner Community