



# Dynamics Existing Customers

Optimize, enhance and manage your business applications through a changing global environment, while preparing for the long term

**Hitachi Solutions Asia Pacific**  
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# Dynamics Existing Customers

Our Dynamics Existing Customer solutions enable improved system performance, usability, and management. They help our customers optimize their existing Dynamics business applications investments, adapt them to support ever-changing business requirements, and establish a clear path to take advantage of complete enterprise cloud computing.

## How we are different

For more than 15 years, Hitachi Solutions has been a trusted and award-winning Microsoft partner who offers unmatched depth and breadth of technical expertise exclusively across the entire Microsoft ecosystem --from business applications to Azure Data and IoT to Modern Workplace technologies to Data Science and AI.

We remain passionate about developing, delivering, and maintaining industry-focused, cloud-based solutions that drive business transformation on a global scale. We also strive to be our clients' most valuable partner by expertly guiding them to the cloud and continuously supporting them on their journey.

Through our people, culture, and experience, we compel powerful results and outcomes and help our clients better compete and succeed in today's digital world.

## Consider your needs

- I need to optimize and improve performance of my existing systems
- I need to adapt my systems to support changing business processes
- I want to understand the new normal to better reach my customers
- I want help to enable my workforce to remain productive, engaged, and connected as a virtual workforce
- I need to secure my company's data
- I need to begin planning migration of existing OnPrem Dynamics AX systems to the Cloud and eventually Dynamics 365

<b>Business Value</b>	<b>Offer</b>
<b>Enhance your system</b>	Unified Interface Migration Planning
	Implementation Refresh: Forms/process clean-up, IP adoption
	System Optimization & Tuning
	Integrations Optimization
	Call Center Virtualization
	PowerApps Maker & Enablement
	Power BI Remote Training
<b>Increase User Adoption</b>	User Scoring Index (USI) Analysis
<b>Improve Data &amp; Analytics</b>	Customer Insights Implementation
	D365 Analytics Tune-Up: Deploy Azure Data Lake/PBI Ent.*
	D365 Analytics Greenfield: Deploy Azure Data Lake/PBI Ent.*
<b>Modernize Systems Management</b>	Managed Services Proactive Monitoring
	Managed Services Offerings for D365 CE

*\*Offer Details Coming Soon*

# Unified Interface Migration

D365 SALES AND CUSTOMER SERVICE

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## Summary

The Unified Interface bridges the gap between your users' experience with Dynamics 365 across web and mobile with a responsive design. Our proven approach for migrating to the Unified Interface will help you enable your users with improved navigation and performance and enhanced productivity.

Engage with Hitachi Solutions for a two-day session and we will educate and help you envision how the migration to Unified Interface will impact your business — way beyond just providing an analysis of a technical migration. During the two days, you will gain an understanding of your existing environment, any potential issues to overcome prior to the migration, and insight into new capabilities that will be available to you with the Unified Interface. You'll walk away knowing the best path for migrating and have an actionable plan to do so.

## Agenda

- Review existing configuration, identifying any known compatibility issues
- Conduct planning session to determine unified interface deployment options
- Discussion of functionality that you may want to take advantage of that is exclusive to the Unified interface

## Deliverables

- Unified Interface Transition Plan document that includes tailored recommendations and an actionable roadmap

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 **Hitachi Solutions**

# Implementation Refresh

## Summary

Existing deployments of Dynamics 365 Customer Engagement require regular refactoring to align them with changing business needs and goals — and with Microsoft's pace of innovation in recent years there are likely many new features your organization can benefit from adopting.

## Agenda

- Interview key stakeholders to identify obstacles and pain points that are limiting the ROI on current Dynamics implementation
- Evaluate business strategy and processes to identify how they differ from the original deployment's assumptions; align with current goals
- Baseline on user adoption, data completeness/cleanliness, system performance
- Simplify and streamline business processes
- Identify obsolete entities, forms, views, reports
- Identify components of Dynamics 365/Power Platform subscription that are unused or underused that can drive value quickly
- Licensing evaluation

## Deliverables

- Comprehensive report of prioritized and actionable roadmap to accelerate ROI
- 80 hours of implementation time to quickly tackle the biggest value driven items

# System Optimization & Tuning

## Summary

- Two-week session reviewing existing D365 Platform & Power Platform usage
- Review performance, metrics, and pain points
- Includes review of platform configuration, security, execution order, plugins, workflows, power automate, audit log, and architecture
- High level review of integrations and potential conflicts
- Overview of current state, future needs, and suggested next steps

## Agenda

- Overview with the customer regarding environment demo and existing user experience
- Review performance expectations, metrics, and impact
- Review current architecture/tools
- Review key processes
- Document/change scripts
- (Add-on) code review

## Deliverables

- Supporting diagrams and documented changes
- Best practices knowledge transfer
- Recommended next steps
- (Add-on) remediated code

# Optimize Integration

## Summary

- Two-week session reviewing existing D365 Platform & Power Platform usage
- Review performance, metrics, and pain points
- Includes review of architecture, execution order, potential conflicts with workflows, plug-ins, power automate, etc.
- Overview of current technology, future needs, and suggested next steps

## Agenda

- Overview with Customer current/future integrations
- Review Performance Expectations of Integrations & Metrics
- Review current architecture / tools
- Review order of execution
- Deep dive into source code for optimization (SQL, Fetch, Jscript, etc.)

## Deliverables

- Integration architecture diagram
- Documented changes
- Original integration baseline vs updates
- Best practices knowledge transfer
- Recommended next steps

# PowerApps Maker Enablement

D365 SALES AND CUSTOMER SERVICE

SELL SHEET

## Summary

This four-week on-site and remote training session combines classroom learning, hands-on labs, assessments, and real-world app development. It's an immersive experience for your team that will equip employees with the skills they need to become able PowerApps and Flow makers, provide your system administrators with proper guidance and best-practices around governance and security, jumpstart app and flow creation, and offer next steps. Attend this comprehensive course and you'll walk away with everything you need to confidently leverage Microsoft PowerApps to support your digital transformation.

## Agenda

- Power Platform Training (2 days)
- Administrator Training (1.5 days)
- Discovery Session (2 days)
- Collaborative Maker Assistance (3 weeks)
- Maker Readiness Assessment (1 day)

## Deliverables

- In-depth training & guidance
- Best practices knowledge transfer
- Assessment & discovery of current state
- Collaborative development of initial apps
- Validation of maker readiness
- Enhance your digital transformation efforts & speed time to value
- Maintain best practices that help administrators ensure security & control
- Improve governance & validation over approval processes
- Ensure controlled scalability & future growth



# Power BI Remote Training

## Summary

- Two-day hands-on, remote
- Customized for the customer with their data
- Hands-on training
- Learn how to rapidly transform data into rich visuals
- No previous experience required

## Agenda

- Introduction to analytics
- Basics of Power BI
- Import data from multiple source files
- Prepare, clean, combine, and model data for analysis
- Analytical report building
- Calculations in Power BI
- Publish interactive report
- Publish dashboard

## Deliverables

### Skills taught:

- How to quickly and easily author interactive data reports without writing any code
- How to connect, explore, model, and visualize data
- Create a real-world example from start to finish

# Operational Analytics

D365 SALES AND CUSTOMER SERVICE

OFFER SHEET

## Summary

- Dynamics 365 operational reporting and analytics from Hitachi Solutions
- Step-by-step, personalized guidance on how Power BI reporting can transform your unique business
- Gain the data visibility, analytics, and operational intelligence you need to take your business into the future

## Agenda

### Week 1

- Workshop/discovery sessions with D365 team and client
- Identify and gather requirements to build dashboards
- Workshop for Azure and Power BI architecture for reporting and analytics
- Discover the D365 data environment

### Week 2-3

- Build custom Power BI reports and dashboards

### Week 4

- Build roadmap and gap analysis
- Workshop on production deployment considerations

## Deliverables

- A thorough understanding of Microsoft Dynamics 365 (D365) Reporting Architecture
- Insight into D365 Power BI reporting options for your implementation
- Interactive data exploration using Power BI visuals, reports, and dashboards
- Three working D365 Power BI reports or dashboards in dev/test/production environments using a representative data set
- Roadmap and gap analysis for D365 Power

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# User Scoring Index (USI) Assessment

## Summary

The focus of this 2-to 3-week assessment is to take high-level challenges and turn them into action plans with a prescriptive approach. This assessment is to help customers who might be mentioning low system morale, low system adoption, post go-live struggles, or low/no ROI. The outcomes of the USI analysis are proven to help build action plans, increase morale, and identify gaps.

## Agenda

### Week 1: Collect

- An independent group of Hitachi Solutions team members conducts a series of workshops, focus groups, ride-alongs, evaluation of documentation, etc.

### Week 2-3: Analyze and Score

- Next, we collect all the data and feedback, categorize it by user groups and process flows, and then groom the list; back and forth follow ups with customer as needed
- Apply our user score index to the list to prioritize, score, and build actual “what if” scoring into the backlog

### Week 4

- The team builds an action plan with a near-term and long-term timeline to show expected outcomes or improvement

## Deliverables

- Immediate action plan to increase adoption based on actual user experience scoring
- Mid-and long-term plans to continue driving user satisfaction, adoption, and usability of the deployed application
- Executive summary readout to support the plan, the business objective achievement gaps, and change management reinforcement
- Tailored communication plan to positively impact end-user satisfaction immediately

# Managed Services Proactive Monitoring

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DATA SHEET

## Summary

Do you have disjointed monitoring solutions that stop you from having a unified vision that shows you what really matters? Monitoring allows you to define a service in a few clicks and integrate the information coming from all your technical tools:

- Infrastructure
- Security (SIEM)
- Applications performance
- Databases
- Log files
- Help desk
- CRM

Hitachi Solutions Monitoring provides a powerful, multi-platform option to replace other expensive and time-consuming monitoring solutions.

## Agenda

- Requirement gathering
  - Business requirements
  - IT requirements
- Discovery and assessment
- Design and architect
  - Components
  - Monitoring flow
  - Alerts and notification

## Deliverables

- Deep dive analysis of your environment by Subject Matter Experts
- Productive vs non-productive report
- Proactive/reactive alert management
- 24x7 round-the-clock monitoring
- Supports IaaS, PaaS, SaaS, on-prem, and hybrid
- Agent and agentless monitoring
- Batch-job process monitoring and reporting

# Managed Services Offerings

D365 SALES AND CUSTOMER SERVICE

DATA SHEET

## Summary

Our comprehensive Managed Services offering can include:

- Certified local and global support professionals who can provide highly responsive coverage, which can be extended to 24/7/365
- Customized, scalable full-suite support for D365 F&O, D365 CE, SharePoint, Azure, Teams, Office 365, Enterprise Mobility Suite, and other Microsoft solutions
- Centralized global service desk and cloud-based ticketing system
- Active account management with a dedicated Customer Success Manager
- Command center for proactive 24/7 monitoring and alert management of your most critical resources available
- Flexible add-on services to assist with specialized skills and complex issues

## Benefits

- Expert support
- Application integration
- Wish list management
- Reporting enhancements
- Stay current
- Functional extensions
- Strategy and planning
- Easy elastic scalability

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Business Value	Offer
Enhance your system	Workspace Optimize*
	Fixed Assets Module Enhance*
	Planning Module Enhance*
	Business Process Optimize*
Increase User Adoption	User Scoring Index (USI) Analysis
Improve Data & Analytics	D365 Analytics Tune-Up: Retire Entity Store, Deploy Azure Data Lake, PBI Ent.*
	D365 Analytics Tune-Up: Deploy Azure Data Lake/PBI Ent.*
	D365 Analytics Greenfield: Deploy Azure Data Lake/PBI Ent.*
	PowerApps Maker & Enablement
Modernize Systems Management	Managed Services Offerings

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D365 FINANCE AND OPERATIONS

SELL SHEET

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<b>Business Value</b>	<b>Offer</b>
<b>Enhance your system</b>	AX System Health Check
	AX Customizations Clean-up & Optimize*
<b>Secure and Prepare for the Cloud</b>	On-Prem AX to Azure IaaS
	AX2012 Pre-R3 Migration
	AX2012 R3 to D365 FO Assessment
<b>Increase User Adoption</b>	User Scoring Index (USI) Analysis
<b>Improve Data &amp; Analytics</b>	AX Analytics Greenfield: Deploy Azure Data Lake + PBI Ent.*
<b>Modernize Systems Management</b>	Managed Services Offerings

*\*Offer Details Coming Soon*

# Dynamics AX System Health Check

## Summary

### Why do a performance review?

- To be proactive
- Maximize by optimizing application
- Identify root cause bottlenecks/pain points
- Understanding root cause
- Reduce downtime and risk
- Extend value of application
- Better adoption of application

### Assessment methodology

- Develop guidelines
- Design approach
- Collect and analyze
- Report findings

## Agenda

- Review application infrastructure environment
- Setup performance scripts
  - System server
  - Application server
  - SQL server
- Capture performance monitors data
- Review captured performance data
- Present performance data
- Performance scorecard

## Deliverables

- Final detailed assessment document that includes the pain points and performance metrics
- Existing infrastructure documents that include quick fix for Dynamics AX, SQL, and Codes
- Performance score cards that focus on Dynamics AX application and SQL
- Performance metric output file —system performance metrics and XML files

# Dynamix AX On-Prem to Azure IaaS

## Why migrate Dynamics AX On-Prem to Microsoft Azure?

Migrating to Azure for hosting and collaboration software, running bigdata apps and, not to mention, moving applications to and from your costly yet inefficient datacenter; moving to Azure to cut down your capital expenditure significantly by converting your operation expenses thanks to fail-safe migration approach to Microsoft Azure.

## Benefits

- Cost-effective
- Cross-compatibility
- Enhanced mobility
- Reliable redundancy
- Security
- Simplified compliance

## Agenda

- Requirement under
  - Business goal
  - Known issues
- Discovery/Assessment
  - Infrastructure
  - Network
  - Application
- Methodologies
  - Enterprise scale proven methodology
  - Design & architect
  - Migration plan
- Optimize
  - Business and IT driven
  - Scale-in and scale-out

## Deliverables

- Business-led Azure migration framework
- Governance, risks, management & tools
- Azure-driven technology roadmap
- Flexible solutions for infrastructure and application
- Managed Support for HyperCare
- Application Modernization
- Best practices knowledge transfer
- Microsoft certified resource pool
- Improved financial management of IT services
- Lower TCO by optimized infrastructure footprint

# AX2012 R3 to D365 FO Assessment

DYNAMICS AX

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## Summary

Determine the best path to migrating from AX2012 to Dynamics 365 and deliver an action plan to do so.

## Agenda

### Week 1: Initiation

- Assessment kick off
- Access to the system
- AX 2012 model-store export
- Deploy demo environment
- Setup LCS for upgrade analysis

### Week 2: Analysis

- Assessment of new features and enhancements
- Business process review
- Customization review
- Code upgrade analysis using Life Cycle Services (LCS)
- Integrations & reports upgrade
- Data migration analysis

### Week 3: Validate

- Prepare assessment documentation
- Prepare cloud infrastructure document
- Complete technical assessment

### Week 2: Analysis

- Proposed solution overview
- Review Cloud infrastructure document
- Detailed ROI Calculation
- LCS Upgrade analysis report
- Upgrade Timeline review
- Proposals for Proof of Concept (POC) for key features

## Deliverables

- Initial solution design overview
- Cloud infrastructure environment document with pricing for technical upgrade
- Life Cycle Services (LCS) upgrade analysis report with architectural suggestions
- Deployment roadmap for technical upgrade vs migration
- Proposals for Proof of Concept (POC) and integration approach
- Detailed ROI calculation using the Hitachi Solutions & Nucleus research D365 ROI financial modeling tool

# AX2012 Pre-R3 Migration Assessment

## Summary

**Envisioning:** Educate on existing system limitations and the benefits of the latest Dynamics platform

**Ground to cloud roadmap:** Build a formal recommendation of cloud transition and based on the system reviews, present the various options as next steps

**Business process reviews:** Map to standard business processes, review the 'day in life' for each business lead, and recommend the latest industry standards

**Code reviews:** Review all the existing custom code and build a recommendation on how to manage it going forward and eliminate customizations where possible

**Integrations:** Review all the integrations and propose a solution going forward and introduce PowerApps if required  
**Solution architecture:** Recommend a solution architecture showing how Dynamics 365 will fit in the existing ecosystem

**ISV:** Review all ISVs and provide estimates to transition them to latest version of Dynamics 365

## Agenda

### Planning Sessions

- Discovery
- Technical
- Infrastructure

### Elaboration

- Execute discovery sessions
- Code reviews
- Infrastructure reviews

### Develop

- Report building
- Review previews

### Deliver

- Report delivery

## Deliverables

- Propose the Dynamics 365 implementation roadmap with various options (technical upgrade or reimplementation)
- Provide clear pros and cons of each approach with Hitachi recommendation
- If phased roll-out, present clear roadmap with showing deliverables in each phase with estimated time for each phase
- Cloud infrastructure environment document with pricing for technical upgrade
- Life Cycle Services (LCS) upgrade analysis report with architectural suggestions
- Detailed ROI calculation using the Hitachi Solutions & Nucleus research D365 ROI financial modeling tool

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