



TOTAL SOLUTION MANAGEMENT

FOR MICROSOFT DYNAMICS 365



Microsoft
Dynamics 365



Microsoft
Azure



Microsoft
Dynamics[®] CRM



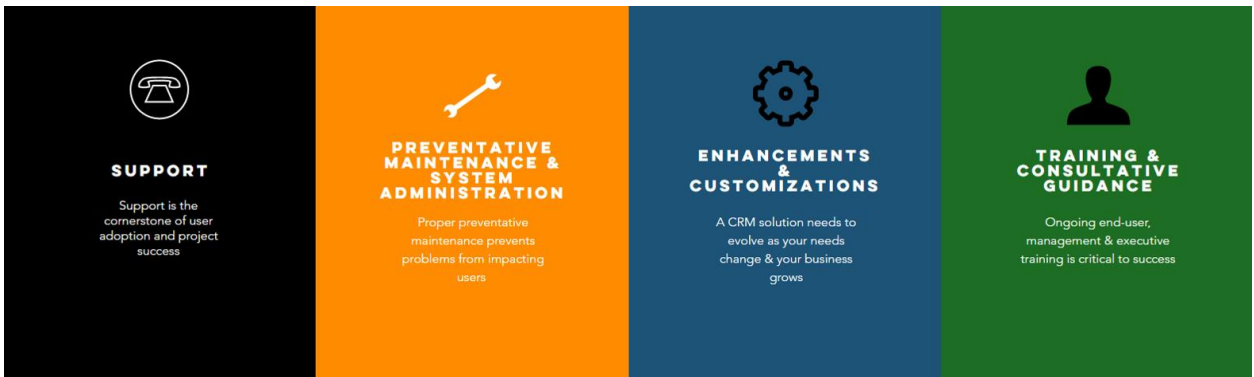
Microsoft
Partner

Total Solution Management (TSM) is a managed service for Microsoft Dynamics 365. With our TSM service you gain an entire team of highly experienced and skilled professionals focused on the Microsoft Dynamics 365 platform. To replicate these skill sets internally you would typically need to hire multiple full-time resources.

Unlimited Help Desk Support

Our TSM service can either be put in place to augment an on-staff Dynamics 365 System Administrator, in this model we become the support team for your trained System Administrator. Help Desk support (1st level) is handled by your internal Admin and we become second level support.

Additional services included in our TSM service span the full best-practice lifecycle management of Dynamics 365:



Ongoing we perform proactive and preventative services to keep your Dynamics 365 system healthy preventing down-time and disruption to your users.

We also provide full management of Dynamics 365 upgrades, ongoing training and a quarterly road-mapping meeting.

Ongoing Services Included in Total Solution Management

- **Unlimited Help Desk support** for trained Dynamics 365 admin/IT team members
- **Up to 8 hours of Professional Services monthly for System Enhancements performed via CRM/D365 configuration tools**
 - ✓ User interface modifications
 - ✓ Create/Modify Personal & System Views
 - ✓ Create Calculated/Rollup Fields
 - ✓ Administer Goal Management Module
 - ✓ Perform data imports
 - ✓ Create/Modify Workflows, Reports & Dashboards

Additional services for enhancements require the purchase of service hours. Total Solution Management customers receive a discounted hourly rate on any additional services purchased.

- **Proactive & Preventative Maintenance**
 - ✓ Monitor System Jobs, Database Size and Health
 - ✓ Review & remediation of system jobs and message flows
 - ✓ Monitor and resolve any issues with server-side sync
 - ✓ Monitor/Manage data integrations
 - ✓ Creation and Monitoring of Bulk Deletion Jobs
 - ✓ Perform regular Backups of the system
 - ✓ SQL Database health check and maintenance (on premise systems)
- **User & Security Role Management**
 - ✓ Create new users
 - ✓ Manage Security Roles
 - ✓ Assist with record ownership reassignment when a user departs
 - ✓ Manage licensing & renewals
- **User Adoption Monitoring & Management**
 - ✓ Identify your specific uses of the system to be monitored
 - ✓ Implement user adoption monitoring tools
 - ✓ Ongoing reporting on user adoption
 - ✓ Quarterly survey of your users
 - Remediation of user adoption issues through training and one-one coaching
- **Manage One Major version upgrade per year**
 - ✓ Review system for compatibility with new version (Customizations, 3rd party solutions)
 - ✓ Manage scheduling of the upgrade with Microsoft
 - ✓ New version training for your users
- **Unlimited Maintenance based Upgrades**
- **Unlimited Access to Bi-Monthly web-based training sessions**

➤ **Quarterly Solution Road-mapping Session**

- ✓ Review overall system use
- ✓ Identify any problem areas and plan for remediation
- ✓ Review support case history
- ✓ Review current and upcoming versions
- ✓ Review user adoption reports
- ✓ Review user base surveys for current period
- ✓ Review & discuss new functionality & 3rd party solutions that may add value
- ✓ Review licensing, renewal and budget
- ✓ Discuss and plan for future phases

Benefits of Total Solution Management

- ✓ Cost – Our comprehensive service is significantly less than hiring internal resources
- ✓ Gain an entire team of certified, experienced Dynamics CRM/365 experts
- ✓ High-level relationships with Microsoft
- ✓ Broad and deep skill sets
- ✓ Use of consistent best practices
- ✓ Improved security & compliance
- ✓ Ongoing solution road mapping and consultative guidance
- ✓ Agility – get issues resolved and enhancements completed quicker