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DynaTech's Competitive Advantage

Backed by years of expertise and a team of skilled professionals, DynaTech Systems stands at the forefront of the IT services industry. Our extensive portfolio includes cutting-edge solutions in cloud, ERP and CRM implementation, data analytics, artificial intelligence, and more.

We prioritize long-term partnerships built on collaboration and trust, delivering innovative, scalable, and secure solutions to keep our clients ahead in a rapidly evolving landscape.

AICPA SOC 2 — AICPA Service Organization Control Reports, Formerly SAS 70 Reports

Microsoft Solutions Partner

Great Place To Work Certified FEB 2025-FEB 2026 INDIA

DUN & BRADSTREET D-U-N-S® REGISTERED™

ISO 9001:2015

CMMI level 3

150+ Global Projects

100+ Happy Clients

450+ Expert Minds

![DynaTech | Systems]
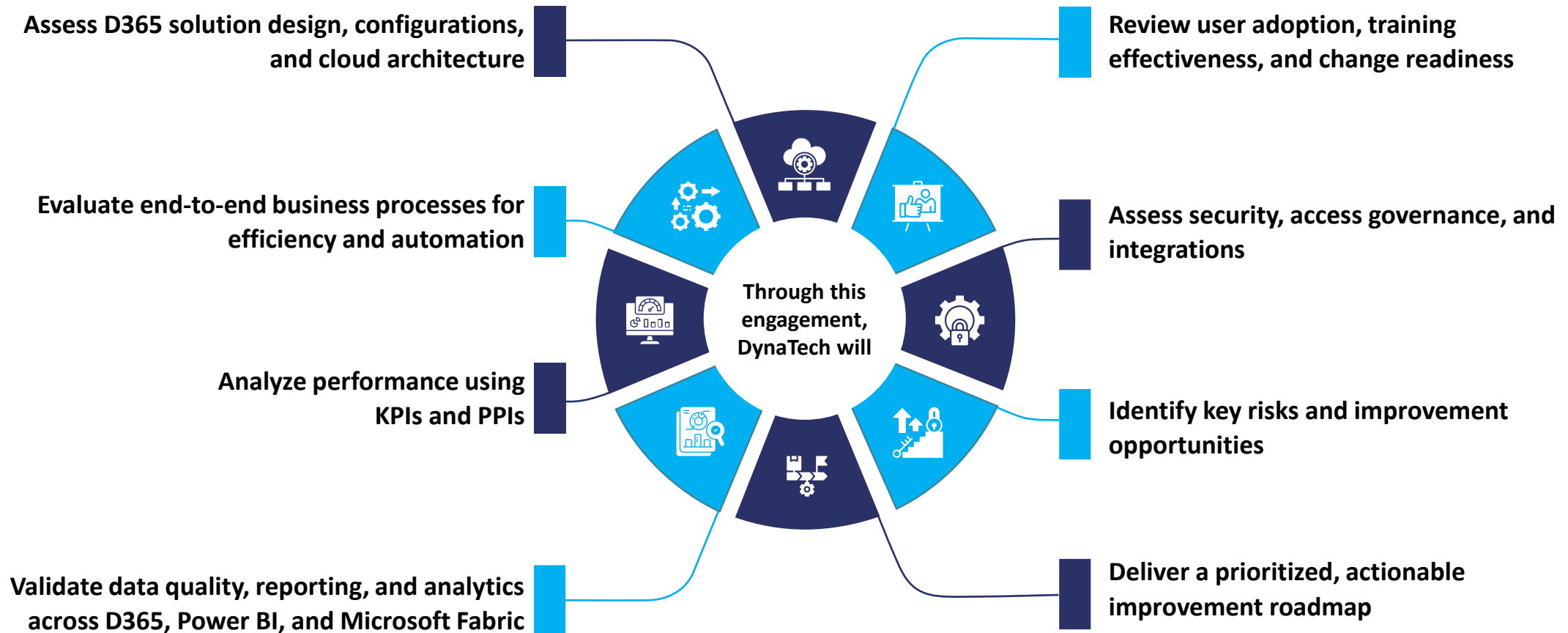
DynaTech Benchmarking & Advisory Services

› The objective of this engagement is to provide an independent, data-driven assessment of the Microsoft Dynamics 365 and Microsoft Cloud ecosystem, including Power Platform and Microsoft Fabric, to confirm solution health and business alignment, identify key risks and optimization opportunities, and ensure scalability and long-term value.

Assess D365 solution design, configurations, and cloud architecture

Review user adoption, training effectiveness, and change readiness

Evaluate end-to-end business processes for efficiency and automation

Assess security, access governance, and integrations

Through this engagement, DynaTech will

Analyze performance using KPIs and PPIs

Identify key risks and improvement opportunities

Validate data quality, reporting, and analytics across D365, Power BI, and Microsoft Fabric

Deliver a prioritized, actionable improvement roadmap

Our Benchmarking Lens

Purpose of Benchmarking

› DynaTech's benchmarking lens provides an objective reference to evaluate how Dynamics 365 enterprise programs within the Microsoft Cloud ecosystem perform in practice.

› Benchmarking helps stakeholders understand relative performance, maturity, and risk compared to recognized standards and peer implementations.

What We Benchmark Against

Industry Best Practices

Commonly adopted enterprise ERP patterns across finance, supply chain, manufacturing, and operations to identify maturity gaps and control weaknesses.

Microsoft-Recommended Patterns

Alignment with Microsoft-recommended configuration, design, security, performance, and extensibility patterns to assess sustainability and upgrade readiness.

Comparable Enterprise Programs

Outcomes from similar Dynamics 365 enterprise programs within the Microsoft Cloud ecosystem, providing practical and realistic benchmarks.

Client-Defined Internal Targets (Where Available)

Existing client KPIs, SLAs, and operational targets used to assess performance against agreed business expectations.

How the Benchmarking Lens Is Applied

Benchmarking is applied across multiple advisory dimensions, including

› Business process performance (KPIs, PPIs, cycle times, rework)

› Automation and integration coverage

› Configuration and customization footprint

› Security and access governance maturity

› Reporting reliability and data trust

› User adoption and operational behavior

This ensures benchmarking remains **outcome-focused and context-driven**, rather than generic.

What Clients Gain from Benchmarking

› **Clear visibility into current-state maturity** across key business and system dimensions

› **An objective understanding of where they stand today**, supported by evidence

› **A practical definition of "good",** based on achievable and relevant benchmarks

› **Focused improvement priorities**, highlighting areas that will deliver the highest business impact

› **Confidence in decision-making**, supported by comparative insight rather than assumptions

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Process	Task	Chemical Industry (Benchmark)			Automation %
		U25%	Med	L25%	
Lead to Cash	Sales documents created	64%	28%	8%	75%
	Sales billing documents created	91%	78%	48%	0%
	Outbound deliveries created	53%	20%	6%	0%
Source to Pay	Purchase order items created	65%	35%	11%	50%
	Supplier invoices created	-	-	-	75%
Plan to Fulfil	Process orders created	61%	35%	12%	100%
Finance	Supplier invoice clearing	76%	89%	72%	0%
	Customer invoice clearing	58%	26%	7%	0%
	Financial documents created	86%	76%	59%	33%

Key Takeaway
The benchmarking lens transforms findings into **contextual insight**, helping leadership teams move from
"What is wrong?" to "What matters most and where should we act first?"

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Project & Governance Advisory
› Provides independent visibility into governance maturity, decision-making, and controls to ensure Dynamics 365 and Microsoft cloud initiatives remain aligned to business objectives and delivered with clarity and accountability.

Security & Access Governance Advisory
› Reviews access controls and security governance to identify compliance risks, segregation-of-duties gaps, and opportunities to strengthen control and accountability

Technical Performance & Stability Advisory
› Assesses system performance, resilience, and scalability under real operational conditions to identify stability risks and improvement opportunities.

Business Process & Performance Advisory
› Assesses how effectively end-to-end business processes are executed in Dynamics 365 and Microsoft Cloud ecosystem, identifying efficiency gaps, control weaknesses, and performance improvement opportunities using data-driven insights.

Reporting, Analytics & Data Trust Advisory
› Strengthens confidence in reporting and analytics by assessing data accuracy, KPI availability, reconciliation gaps, and single-source-of-truth readiness.

User Adoption & Change Effectiveness Advisory
› Evaluates how effectively Dynamics 365 is adopted across the organization, highlighting usability, training, and change-related factors impacting realized ROI.

System Configuration & Solution Design Advisory
› Evaluates whether system configuration and design choices support business requirements, scalability, and long-term sustainability while minimizing customization and upgrade risks.

Integration & Automation Advisory
› Examines integrations and automation coverage to identify manual dependencies, data synchronization risks, and opportunities to improve operational efficiency.

Consolidated Insights & Optimization Roadmap
› Brings all findings together into a prioritized, business-aligned roadmap that supports stabilization, optimization, and future scalability.

Project & Governance Advisory | Business Process & Performance Advisory | System Configuration & Solution Design Advisory | Security & Access Governance Advisory | Reporting, Analytics & Data Trust Advisory | Integration & Automation Advisory | Technical Performance & Stability Advisory | User Adoption & Change Effectiveness Advisory | Consolidated Insights & Optimization Roadmap

Project & Governance Advisory Review

Why This Area Matters

Strong governance ensures Dynamics 365 and Microsoft Cloud initiatives remain aligned to business objectives, controlled, and predictable. Gaps in governance often lead to delays, scope creep, rework, and unclear ownership, even when the system itself is technically sound.

What We Review

- Alignment between business objectives and program execution
- Governance structure, decision-making forums, and ownership clarity
- Change, release, and DevOps governance effectiveness
- Risk, issue, and dependency management practices
- Visibility into delivery progress, quality, and controls
- Environment strategy and go-live readiness governance, including decision checkpoints and sign-off accountability

Outcomes for the Business

- Clear visibility into governance maturity and control gaps
- Early identification of risks impacting timelines, scope, and quality
- Practical recommendations to strengthen oversight and accountability

| Project & Governance Advisory | Business Process & Performance Advisory | System Configuration & Solution Design Advisory | Security & Access Governance Advisory | Reporting, Analytics & Data Trust Advisory | Integration & Automation Advisory | Technical Performance & Stability Advisory | User Adoption & Change Effectiveness Advisory | Consolidated Insights & Optimization Roadmap |
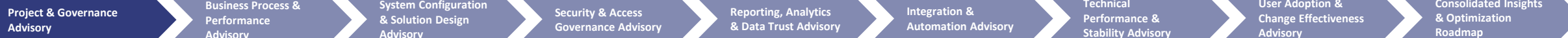
Project & Governance Advisory Review Example

Project Status

1	2	4
Green: 80–100	Amber: 61–79.5	Red: 0–60.5

Total Project Success Potential (0-100)	54.5

Executive Summary

› Use and quality of DevOps continues to be an issue.
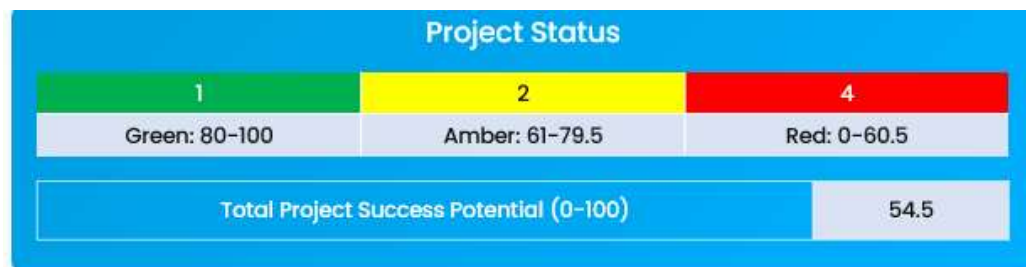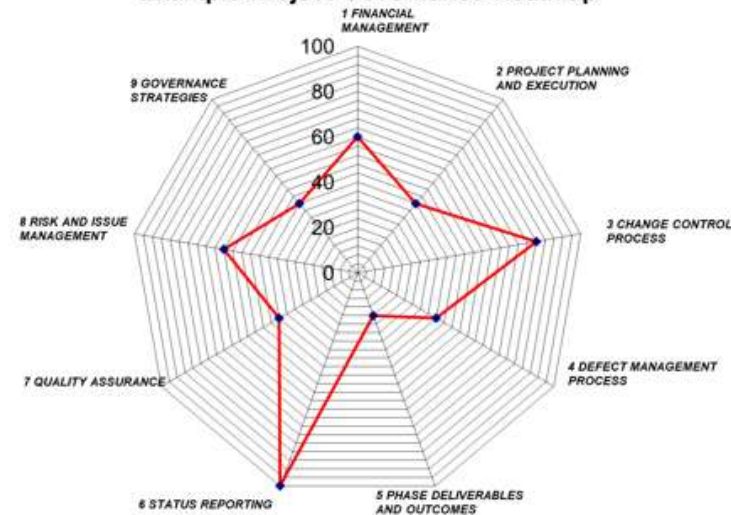› Not following Defect Management process resulted in Production issues remaining unresolved for more than 1 month.
› Missing Critical Path and Business Objectives.

Example Project Governance Heatmap

RAG	Governance Area	Concerns	Actions	Owner
Y	Financial Management	Quality of data in DevOps	Continually improve team's use of DevOps	
R	Project Planning and Execution	DevOps Quality, Missing Critical Path, and Missing Business Objectives	Continually improve team's use of DevOps, Document Critical Path, Document Business Objectives	
R	Defect Management Processes	Logging, triage, and resolution of Bugs	Implement Triage process and improve Bug Ownership and Resolution	
R	Phase Deliverables and Outcomes	Acceptance of Iteration and Phase Deliverables	Implement daily priority reviews with Client PM	
Y	Quality Assurance	Missing Critical Path and Regular Reviews of Solution Designs	Document Critical Path	
R	Risk and Issue Management	Logging of Risks and Issues in DevOps	Continually train team on proper logging of Risks and Issues	

Project & Governance Advisory → Business Process & Performance Advisory → System Configuration & Solution Design Advisory → Security & Access Governance Advisory → Reporting, Analytics & Data Trust Advisory → Integration & Automation Advisory → Technical Performance & Stability Advisory → User Adoption & Change Effectiveness Advisory → Consolidated Insights & Optimization Roadmap

Business Process & Performance Advisory

Why This Area Matters

Dynamics 365 and supporting Microsoft Cloud services success is driven by how processes actually run, not just how they were designed. Inefficient execution, manual workarounds, and inconsistent controls directly impact cost, cycle time, and user confidence.

What We Review

- Designed processes versus real system execution
- Process efficiency, handoffs, and control effectiveness
- Manual workarounds and Excel/off-system dependencies
- Process performance using KPIs, PPIs, and data-driven analysis

Outcomes for the Business

- Identification of bottlenecks, delays, and rework drivers
- Quantified performance gaps and improvement opportunities
- Clear insights to improve efficiency, automation, and control coverage

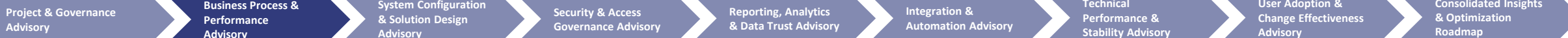Project & Governance Advisory → **Business Process & Performance Advisory** → System Configuration & Solution Design Advisory → Security & Access Governance Advisory → Reporting, Analytics & Data Trust Advisory → Integration & Automation Advisory → Technical Performance & Stability Advisory → User Adoption & Change Effectiveness Advisory → Consolidated Insights & Optimization Roadmap
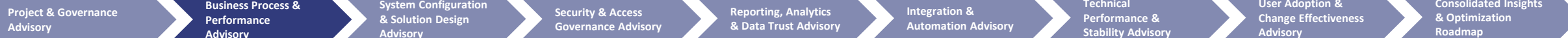
Business Process & Performance Advisory Example

Process Status Summary

Work Item Type	Process Area	Process Group	Catalog Status	Article Status	Description
End to end	70 Plan to produce	70 Plan to produce	Published	60. Published	Defines the end-to-end activities required to plan and prepare production.
Process area	70.10 Develop production	70.10 Develop production	Published	60. Published	Establishes production strategies, standards, and operating frameworks.
Process	70.10 Develop production	70.10.010 Develop production processes	Published	60. Published	Designs and documents standard production processes and workflows.
Process		70.10.030 Map value streams	Published	10. Not Started	Maps end-to-end value streams to identify flow and improvement areas.
Process		70.10.040 Identify production resources	Published	10. Not Started	Identifies labor, equipment, and capacity required for production.
Process		70.10.050 Develop subcontracting strategy	Published	10. Not Started	Defines subcontracting approaches to support capacity and cost goals.
Process		70.10.060 Correct production processes	Published	10. Not Started	Reviews and corrects production processes to resolve gaps and issues.
Process area	70.20 Plan production operations	70.20 Plan production operations	Published	60. Published	Translates production strategy into executable operational plans.
Process	70.20 Plan production operations	70.20.010 Modify production plan	Published	10. Not Started	Updates production plans based on changes in demand or capacity.
Process		70.20.020 Create production plan	Published	10. Not Started	Creates detailed production plans to meet demand requirements.
Process		70.20.030 Schedule production jobs	Published	10. Not Started	Schedules production jobs and allocates resources.
Process		70.20.040 Release production to shop floor	Published	10. Not Started	Releases approved production orders to the shop floor.
Process		70.20.050 Estimate the cost of production	Published	10. Not Started	Estimates production costs for planning and control.
Process area	70.30 Run production operations	70.30 Run production operations	Published	60. Published	Executes production plans through shop-floor operations.

Done Incomplete Missing

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Business Process & Performance Advisory Example

Process Audit Summary

Department / Function	Key User Name	Do Users Possess D365 System Capability Knowledge?	Does User Know All Scope / Current Requirement?	Is Design and Process Mapping Understood?	Does User Have Confirmed All Test Cases?	Is User Received Training?	Do Users Know System Setup, Configuration and Master Data?	Does User Have Executed Basic System Testing?	Does User Have Executed All Test Cases?	Does User Have Completed and Signed Off on UAT?	Can User Find Related Data or Query in System?
Accounting Team	Peter Walz	🟩	🟩	🟩	🟩	🟩	🟩	🟨	🟥	🟥	
Accounting Team	Mark Keim	🟥	🟨	🟨	🟨	🟩	🟨	🟥	🟥	🟥	
Cash and Bank Team	Nick Turley	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟥	🟥	

Done — **Incomplete** — **Missing**

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Business Process & Performance Advisory Example

Process Performance & Execution Insight

› Deeper analysis of end-to-end process behavior using execution data to identify bottlenecks, rework loops, and efficiency gaps across selected business processes.

› Detailed benchmarking of process and operational performance against industry, Microsoft-recommended, and client-defined targets to quantify gaps and improvement potential.
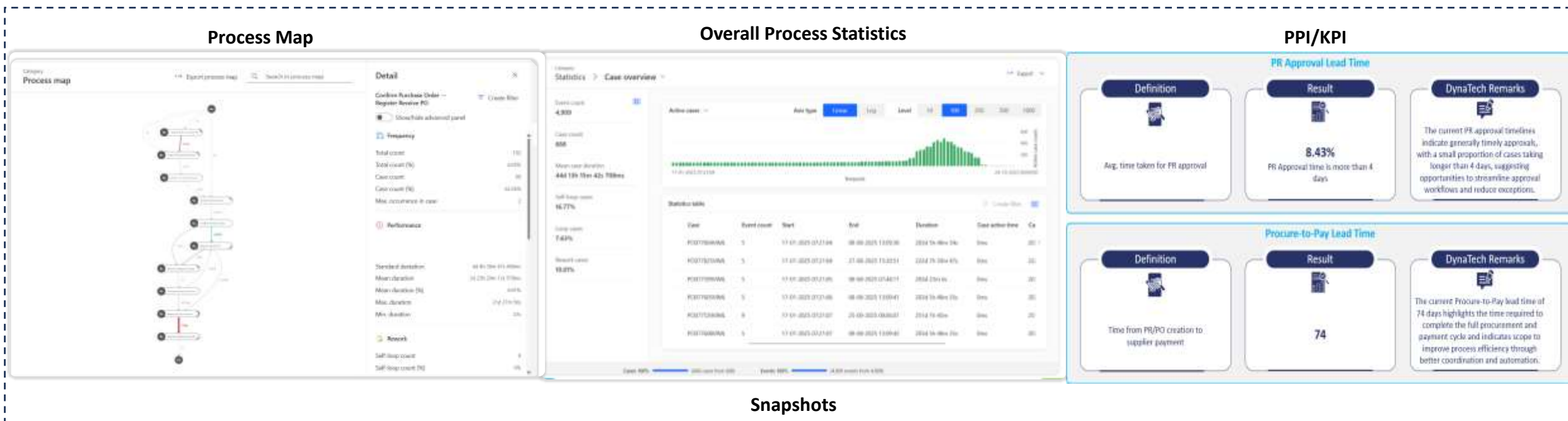
Process Map   **Overall Process Statistics**   **PPI/KPI**

Snapshots

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System Configuration & Solution Design Advisory

Why This Area Matters

System configuration and design decisions directly affect data accuracy, scalability, upgrade readiness, and long-term sustainability. Configuration issues often remain hidden until they cause operational disruption.

What We Review

- Alignment of system configuration with business requirements
- Consistency of setup across modules and legal entities
- Customization footprint and dependency on non-standard solutions
- Scalability, upgrade, and maintainability considerations

Outcomes for the Business

- Visibility into configuration-driven risks and design gaps
- Recommendations to simplify, standardize, and future-proof the solution
- Improved readiness for upgrades and ongoing optimization

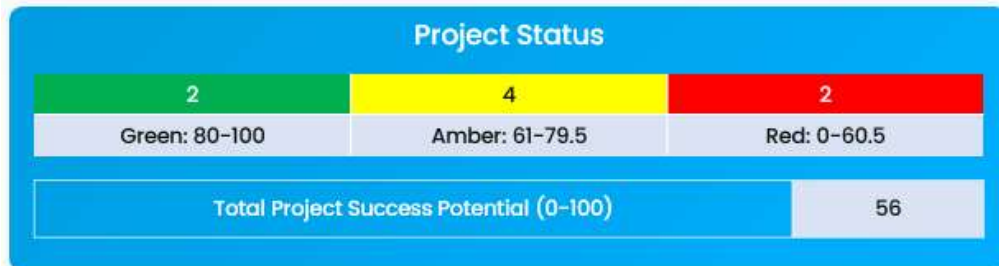| Project & Governance Advisory | Business Process & Performance Advisory | System Configuration & Solution Design Advisory | Security & Access Governance Advisory | Reporting, Analytics & Data Trust Advisory | Integration & Automation Advisory | Technical Performance & Stability Advisory | User Adoption & Change Effectiveness Advisory | Consolidated Insights & Optimization Roadmap |

System Configuration & Solution Design Advisory Example

Project Status

Green: 80-100	Amber: 61-79.5	Red: 0-60.5
2	4	2

Total Project Success Potential (0-100)	56

Executive Summary›

› Configuration and solution design inconsistencies are impacting standardization and scalability.

› Variations in setup and reliance on non-standard configurations increase complexity and upgrade risk.

› Improved alignment between design decisions and business requirements is required.

Example Project Solution Heatmap
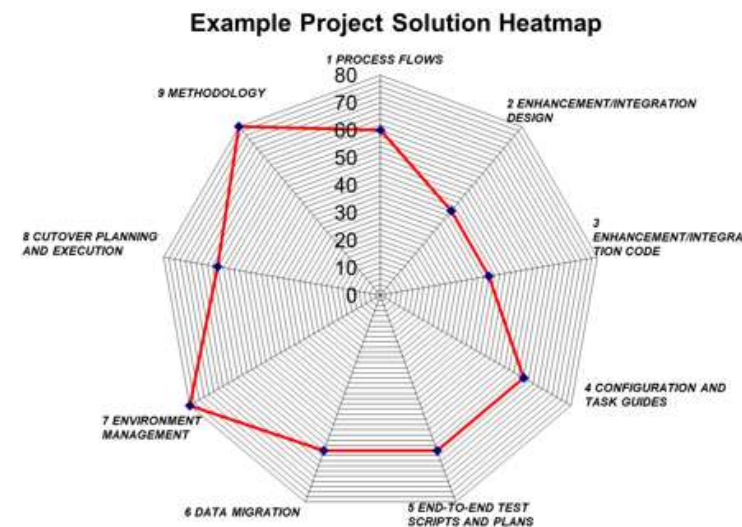
RAG	Component	Concerns	Actions	Owner
Y	Solution Design	Management of Scope in DevOps	Continue to improve Change Control Processes	
R	Enhancement/Integration Designs	Timely delivery and approval of FDDs	Implement daily priority reviews with Client PM	
Y	Enhancement/Integration Code	Code Reviews	Perform Code Reviews of Enhancements and Integrations	
Y	Configurations and Task Guides	Timely Approval of Configurations	Implement daily priority reviews with Client PM	
Y	End-to-End Test Scripts and Plans	Development of End-to-End Scenarios	Produce E2E Scenario Test Plan	
R	Data Migration	Timely delivery of Data	Implement daily priority reviews with Client PM	

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Security & Access Governance Advisory

Why This Area Matters

Weak access controls and security governance expose organizations to compliance risk, fraud, and operational disruption. Security issues often stem from role design and governance gaps rather than technical limitations.

What We Review

- Role-based access and segregation of duties
- Privileged access and auditability of sensitive transactions
- Governance around user provisioning and access changes
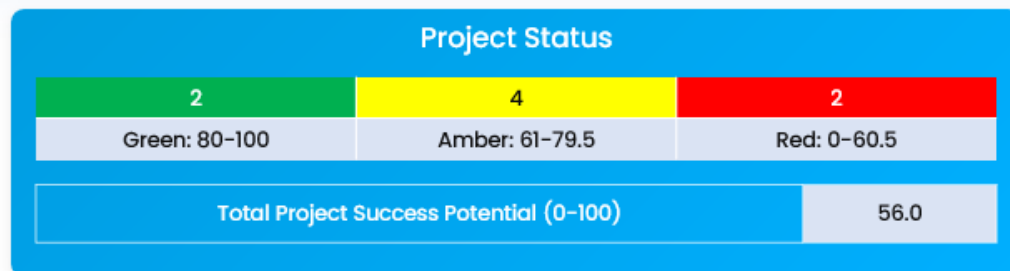- License usage and security-related risk exposure

Outcomes for the Business

- Clear identification of access risks and compliance gaps
- Practical recommendations to strengthen security governance
- Improved confidence in system controls and regulatory readiness

| Project & Governance Advisory | Business Process & Performance Advisory | System Configuration & Solution Design Advisory | Security & Access Governance Advisory | Reporting, Analytics & Data Trust Advisory | Integration & Automation Advisory | Technical Performance & Stability Advisory | User Adoption & Change Effectiveness Advisory | Consolidated Insights & Optimization Roadmap |

Security & Access Governance Advisory Example

Project Status

2	4	2
Green: 80-100	Amber: 61-79.5	Red: 0-60.5

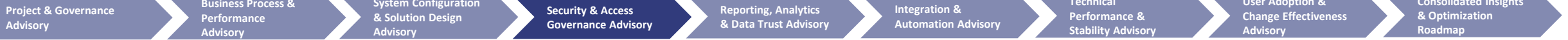| Total Project Success Potential (0-100)	56.0

Executive Summary
› User access growth has not been accompanied by strong governance controls.
› Excessive privileged access identified, including standard and custom System Administrator roles.
› Inactive and unused accounts remain enabled, increasing compliance and security risk.
› Segregation of duties and cross-department role assignments are not consistently enforced.
› License and role utilization indicate opportunities for cost optimization and risk reduction.

Example Security Governance Heatmap Assessment Areas Covered
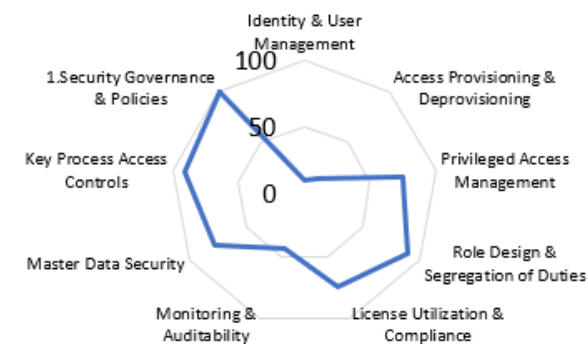
RAG	Component	Concerns	Actions	Owner
Y	Identity & User Management	High number of inactive and disabled users still present in system	Implement periodic user access reviews and automated deprovisioning	IT / Security
R	Privileged Access Management	Excessive System Administrator access (standard & custom roles)	Reduce admin access, enforce least-privilege model	IT Security
R	Role Design & SoD	Cross-department access and overlapping responsibilities	Redesign roles with segregation of duties controls	Functional Leads
Y	License Governance	License usage not aligned with actual role requirements	Optimize license assignment based on role usage	IT / Procurement
R	Key Process Access	Broad access to critical business and production processes	Restrict access using role-based controls	Business Owners
Y	Master Data Security	Departmental ownership of master data not clearly enforced	Define master data ownership and approval workflows	Data Governance
R	Monitoring & Auditability	Limited visibility into user activity and access changes	Enable audit logging and access change tracking	IT / Compliance

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Security & Access Governance Advisory Example

Security & Access Governance Insight

› Focused review of access design, segregation-of-duties exposure, and governance maturity to identify compliance and control risks.

Governance Dimension	RAG	Benchmark Insight
User Access Hygiene	Y	Gap between enabled users and actual system usage indicates the need for periodic access reviews and cleanup
Role Design & Segregation of Duties	R	Heavy reliance on broad, full-license roles increases segregation-of-duties and audit exposure
Privileged (System Admin) Access	R	Elevated number of standard and custom system administrator roles exceeds recommended governance thresholds
Department-Based Access Ownership	Y	Cross-department role assignments indicate unclear ownership of department-specific access
Master Data & Critical Process Access	Y	Broad distribution of master data and key process access increases risk of unintended or unauthorized changes
Access Visibility & Auditability	G	User activity, role assignments, and access data are traceable, enabling effective governance and remediation

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Reporting, Analytics & Data Trust Advisory

Why This Area Matters

Reliable reporting and analytics are critical for decision-making and performance management. Data inconsistencies, reconciliation gaps, and latency issues erode trust in the system.

What We Review

- Accuracy and reliability of financial and operational reports
- Data sources, reconciliation gaps, and latency issues
- Power BI dashboards and KPI availability
- Single-source-of-truth readiness
- Data readiness and integrity across migrated and live transactional data

Outcomes for the Business

- Improved transparency into data quality and reporting issues
- Clear understanding of gaps impacting insight and decisions
- Recommendations to strengthen reporting reliability and confidence

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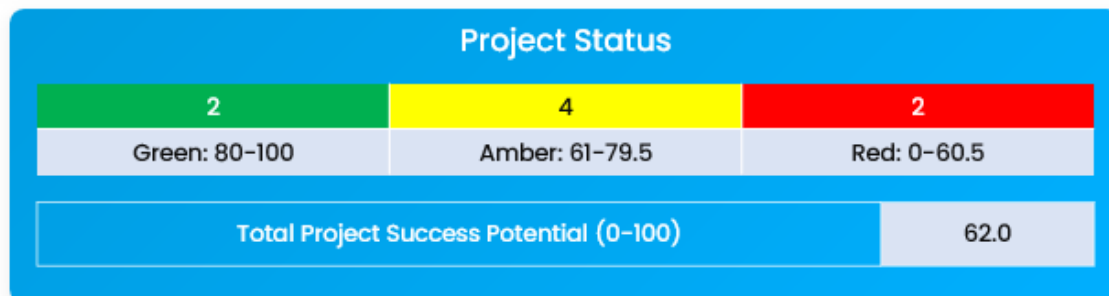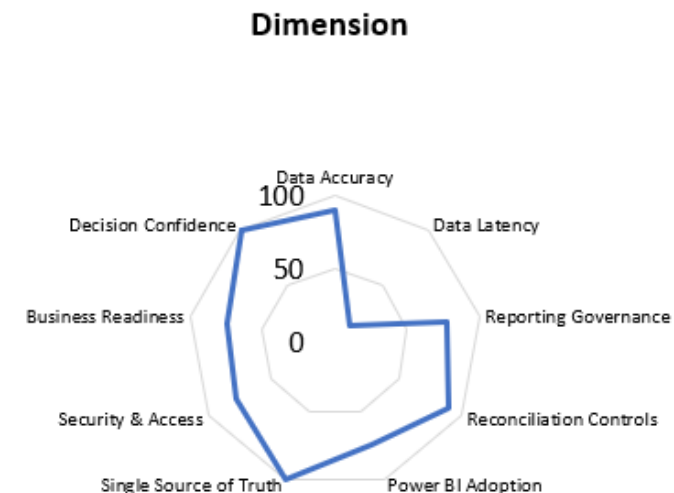| Project & Governance Advisory | Business Process & Performance Advisory | System Configuration & Solution Design Advisory | Security & Access Governance Advisory | Reporting, Analytics & Data Trust Advisory | Integration & Automation Advisory | Technical Performance & Stability Advisory | User Adoption & Change Effectiveness Advisory | Consolidated Insights & Optimization Roadmap |

Reporting, Analytics & Data Trust Advisory Example

Project Status

2	4	2
Green: 80-100	Amber: 61-79.5	Red: 0-60.5

Total Project Success Potential (0-100)	62.0

Executive Summary

› **Reporting outputs are not consistently trusted as a single source of truth**, resulting in parallel Excel-based reconciliations and manual validation.

› **Data quality issues and reconciliation gaps** across source systems impact confidence in financial and operational KPIs.

› **Ownership of reports, data definitions, and refresh logic is unclear**, limiting accountability and slowing issue resolution.

Dimension

Radar chart with dimensions: Data Accuracy, Data Latency, Reporting Governance, Reconciliation Controls, Power BI Adoption, Single Source of Truth, Security & Access, Business Readiness, Decision Confidence (scale 0–100)

RAG	Component	Concerns	Actions	Owner
Y	Data Accuracy & Consistency	Variance between Power BI, D365, and offline reports	Define authoritative data sources and standard KPI definitions	Data Owner
R	Reporting Trust	Business does not rely on system reports for decisions	Implement data validation, reconciliation controls, and certification of key reports	Finance / IT
Y	Governance & Ownership	No clear accountability for dashboards and KPIs	Assign report owners, refresh SLAs, and issue escalation paths	Program Sponsor

Project & Governance Advisory

Business Process & Performance Advisory

System Configuration & Solution Design Advisory

Security & Access Governance Advisory

Reporting, Analytics & Data Trust Advisory

Integration & Automation Advisory

Technical Performance & Stability Advisory

User Adoption & Change Effectiveness Advisory

Consolidated Insights & Optimization Roadmap

Integration & Automation Advisory

Why This Area Matters

Integrations and automation are critical to operational continuity and efficiency. Poor integration design often results in manual effort, data inconsistencies, and hidden operational risk.

What We Review

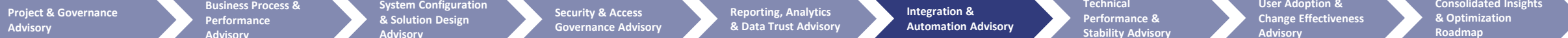- Reliability and robustness of system integrations
- Data synchronization and error handling effectiveness
- Automation coverage across key business processes
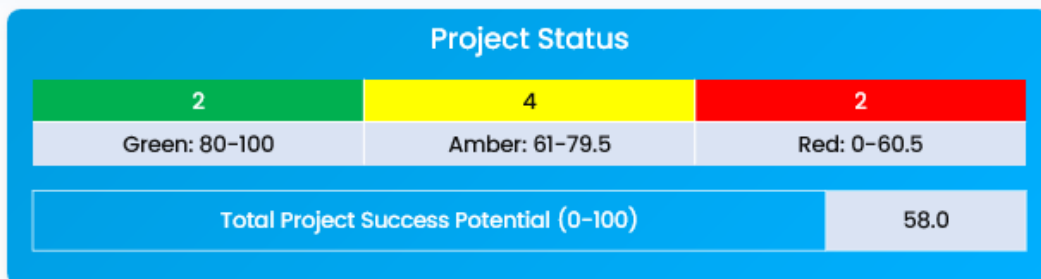- Manual handoffs and dependency-driven risks

Outcomes for the Business

- Identification of integration gaps and automation opportunities
- Reduced operational risk and manual effort
- Improved system interoperability and process continuity

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Integration & Automation Advisory Example

Project Status

2	4	2
Green: 80-100	Amber: 61-79.5	Red: 0-60.5

Total Project Success Potential (0-100)	58.0

Dimension

Executive Summary

› **Core integrations are functional but not consistently reliable**, resulting in manual intervention during failures and peak processing periods.

› **Automation coverage across end-to-end processes is uneven**, with several critical handoffs still executed outside the system.

› **Limited monitoring and error-handling visibility** increases operational risk and delays issue detection and resolution..
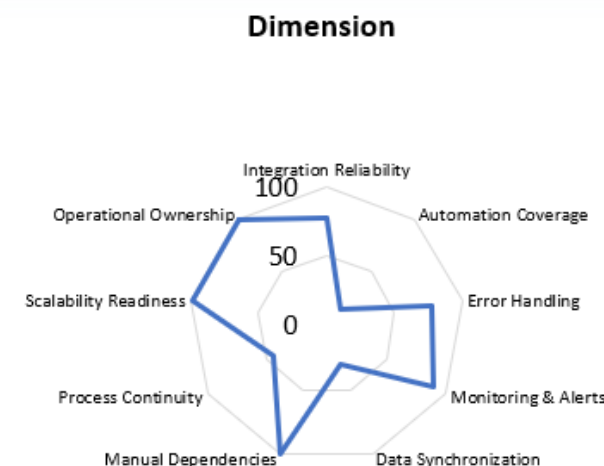
RAG	Component	Concerns	Actions	Owner
Y	Integration Design	Tight coupling increases failure impact	Introduce decoupled, resilient integration patterns	IT Architecture
R	Error Handling & Monitoring	Failures require manual intervention	Implement centralized logging, alerts, and auto-retry mechanisms	IT Ops
Y	Automation Coverage	Manual steps remain in key processes	Expand automation for approvals, validations, and data sync	Process Owners
G	Core Interfaces	Stable for standard transactions	Maintain current setup with periodic health checks	IT Ops
Y	Process Handoffs	Off-system handoffs reduce traceability	Move handoffs into D365 / Power Platform workflows	Business / IT
G	Standard Platform Tools	Azure & Power Platform well adopted	Leverage further for automation expansion	Platform Team

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Technical Performance & Stability Advisory

Why This Area Matters

Technical performance issues can significantly impact business operations, user experience, and confidence in the platform, especially during peak and period-end cycles.
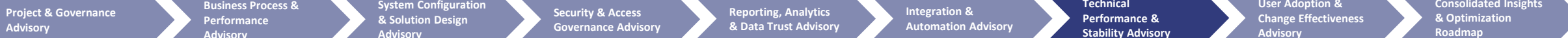
What We Review

- System behavior under peak and period-end loads
- Batch processing effectiveness and failure patterns
- Long-running processes and performance constraints
- Monitoring readiness and operational resilience
- Validation of test coverage adequacy for business-critical scenarios, including UAT and regression testing
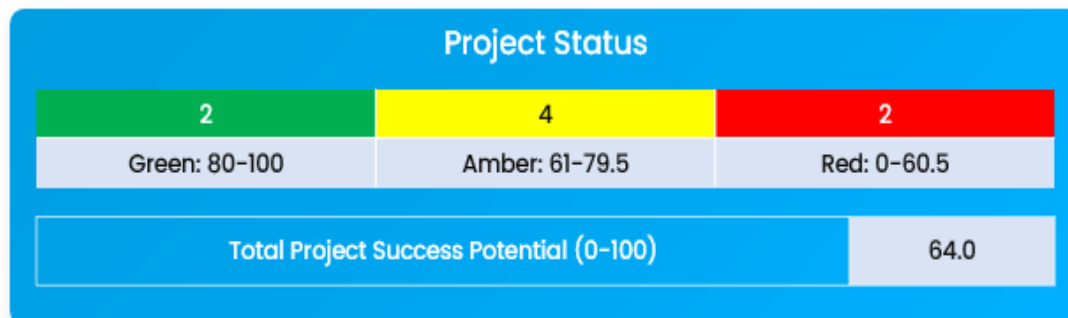
Outcomes for the Business

- Early visibility into performance and stability risks
- Recommendations to improve resilience and scalability
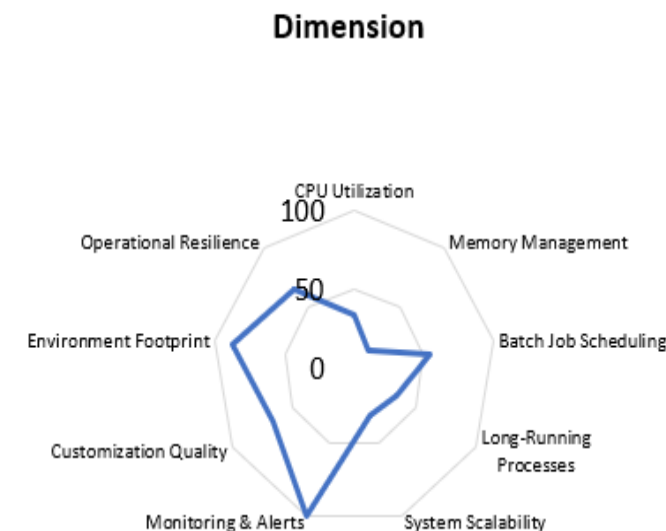- Reduced risk of business disruption due to system issues

| Project & Governance Advisory | Business Process & Performance Advisory | System Configuration & Solution Design Advisory | Security & Access Governance Advisory | Reporting, Analytics & Data Trust Advisory | Integration & Automation Advisory | Technical Performance & Stability Advisory | User Adoption & Change Effectiveness Advisory | Consolidated Insights & Optimization Roadmap |

Technical Performance & Stability Advisory Example

Project Status

2	**4**	**2**
Green: 80-100	Amber: 61-79.5	Red: 0-60.5

Total Project Success Potential (0-100)	64.0

Executive Summary

› **Core system stability is acceptable under normal operations**, with CPU utilization remaining consistently low and within safe thresholds.

› **Memory consumption shows increasing instability**, progressing from recoverable drops to volatility and sustained decline, particularly during peak processing windows.

› **Batch job execution volume is heavily skewed toward standard jobs**, with occasional high-volume spikes that elevate risk during critical business cycles.

Dimension

RAG	Component	Concerns	Actions	Owner
Y	Batch Processing	Parallel execution causes resource contention	Reschedule high-impact batch jobs to off-peak windows	IT Ops
R	Memory Stability	Sustained memory decline increases outage risk	Identify memory-intensive jobs, enable recycling, optimize caching	Platform Team
G	CPU Capacity	No sustained CPU pressure observed	Maintain current configuration and monitoring	IT Ops

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Technical Performance & Stability Advisory Example

Technical Performance & Stability Insight

› Targeted analysis of system performance, batch workload behavior, and stability indicators under real operating conditions.

Technical Dimension	RAG	Benchmark Insight
Platform Capacity (CPU / Compute)	G	CPU utilization remains stable and within Microsoft-recommended thresholds; infrastructure capacity is not a limiting factor
Memory Management & Stability	Y	Memory volatility observed under peak workloads indicates execution and scheduling optimization gaps
Batch Processing & Period-End Load	Y	Batch workloads dominate system load with predictable spikes during business-critical cycles
Long-Running & Memory-Intensive Jobs	Y	Certain batch processes contribute to peak-window contention and memory pressure
Peak & Period-End Readiness	R	Elevated operational risk during peak processing windows without proactive governance
Scalability & Growth Readiness	Y	Current setup supports existing volumes; optimization required for future scale

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User Adoption & Change Effectiveness Advisory

Why This Area Matters

Even a well-designed system fails to deliver value if users do not fully adopt it. Adoption gaps lead to manual workarounds, inconsistent data, and lower ROI.
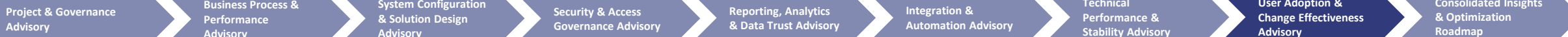
What We Review

- Role-based system adoption and usage patterns
- User experience and usability challenges
- Training effectiveness and change readiness
- Dependency on Excel and off-system tools
- Support readiness, issue resolution effectiveness, and ownership clarity following go-live
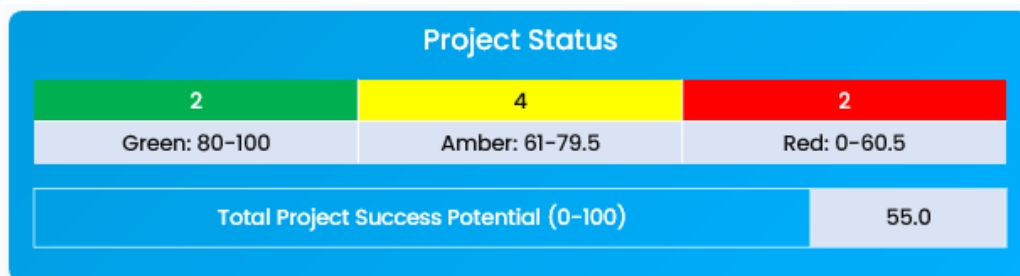
Outcomes for the Business

- Clear understanding of adoption gaps and enablement needs
- Insights into factors limiting realized ROI
- Recommendations to improve usability, training, and change effectiveness

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User Adoption & Change Effectiveness Advisory Example

Project Status

2	4	2
Green: 80-100	Amber: 61-79.5	Red: 0-60.5

Total Project Success Potential (0-100)	55.0

Executive Summary

› **System stability has improved, but user adoption remains uneven across roles and functions,** limiting realized business value.

› **Users continue to rely on Excel, email, and Teams** for day-to-day work, particularly in Sales, reporting, and exception handling.

› **Training and change enablement are insufficiently role-based,** resulting in low confidence, inconsistent usage, and dependence on informal "super users."
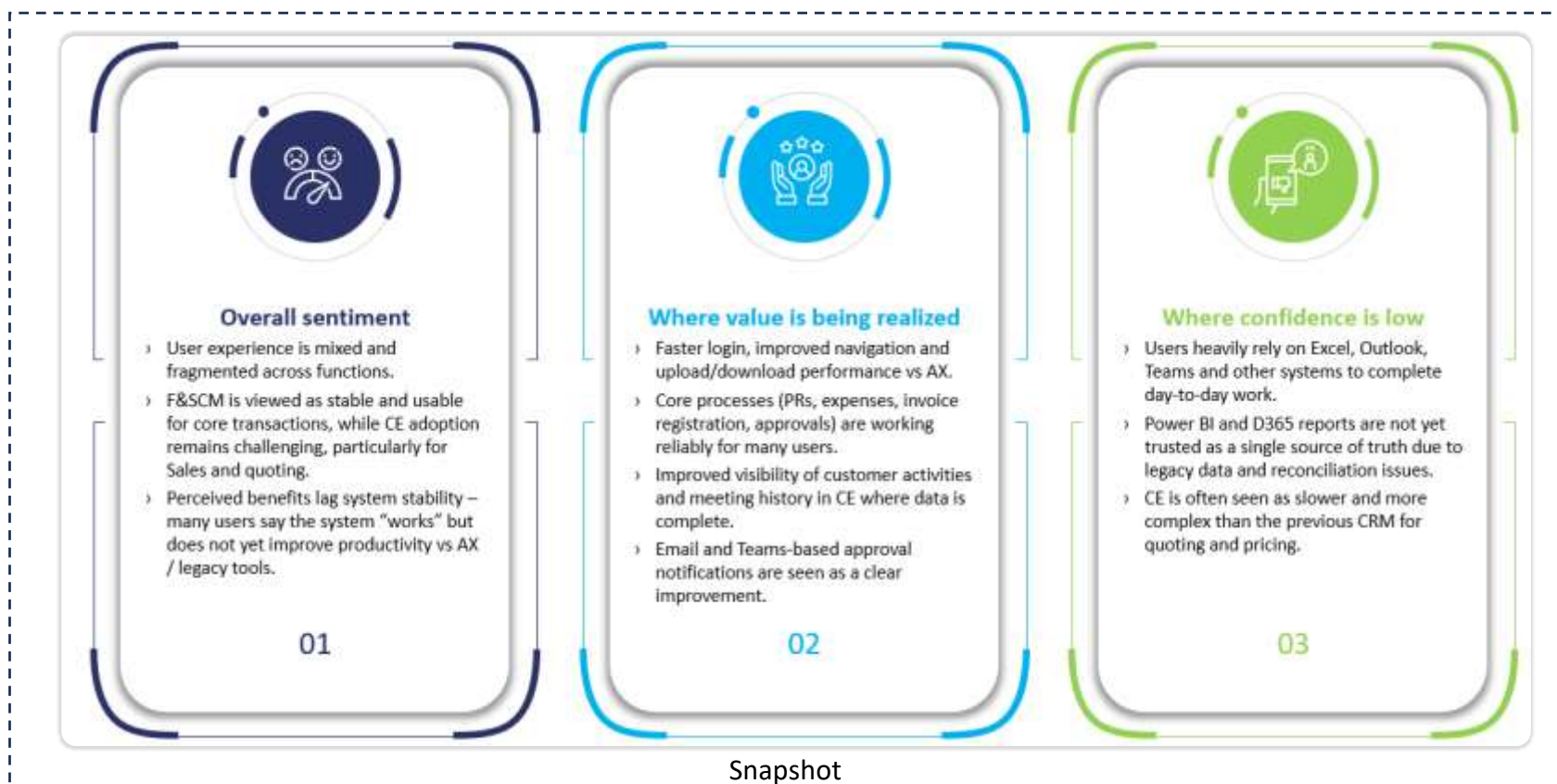
Example Project User Adoption Heatmap
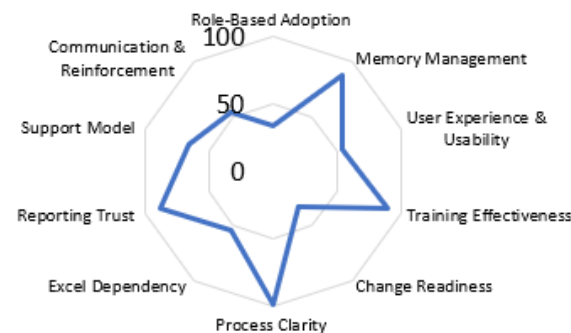
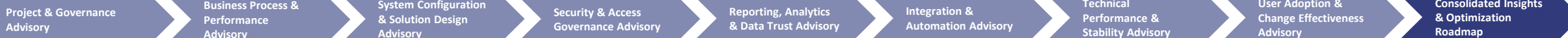| RAG	Component	Concerns	Actions	Owner
Y	Role-Based Adoption	Inconsistent usage across functions	Define role-specific adoption expectations and KPIs	Business Leads
R	Training & Enablement	Training not aligned to real scenarios	Introduce role-based, scenario-driven training	Change Lead
Y	Process Clarity	Users unsure of standard ways of working	Publish clear SOPs and in-system guidance	Process Owners
Y	Excel Dependency	Heavy off-system workarounds	Migrate critical activities into D365	Business / IT
G	Core Transaction Usage	Core processes are used consistently	Maintain and reinforce current practices	Ops
R	Change Reinforcement	Limited post go-live reinforcement	Establish structured adoption and reinforcement plan	Program Sponsor

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User Adoption & Change Effectiveness Advisory Example

User Adoption & Change Effectiveness Insight

› Deeper evaluation of user experience, training effectiveness, and behavioral adoption patterns impacting realized ROI.

Overall sentiment

› User experience is mixed and fragmented across functions.

› F&SCM is viewed as stable and usable for core transactions, while CE adoption remains challenging, particularly for Sales and quoting.

› Perceived benefits lag system stability – many users say the system "works" but does not yet improve productivity vs AX / legacy tools.

01

Where value is being realized

› Faster login, improved navigation and upload/download performance vs AX.

› Core processes (PRs, expenses, invoice registration, approvals) are working reliably for many users.

› Improved visibility of customer activities and meeting history in CE where data is complete.

› Email and Teams-based approval notifications are seen as a clear improvement.

02

Where confidence is low

› Users heavily rely on Excel, Outlook, Teams and other systems to complete day-to-day work.

› Power BI and D365 reports are not yet trusted as a single source of truth due to legacy data and reconciliation issues.

› CE is often seen as slower and more complex than the previous CRM for quoting and pricing.

03

Snapshot

Project & Governance Advisory → Business Process & Performance Advisory → System Configuration & Solution Design Advisory → Security & Access Governance Advisory → Reporting, Analytics & Data Trust Advisory → Integration & Automation Advisory → Technical Performance & Stability Advisory → User Adoption & Change Effectiveness Advisory → Consolidated Insights & Optimization Roadmap

Consolidated Insights & Optimization Roadmap

Purpose of Consolidation

All insights from the coverage areas are brought together into a single, integrated, and decision-ready view.

What Stakeholders Receive

- Consolidated findings across all advisory areas
- Risk- and impact-based prioritization
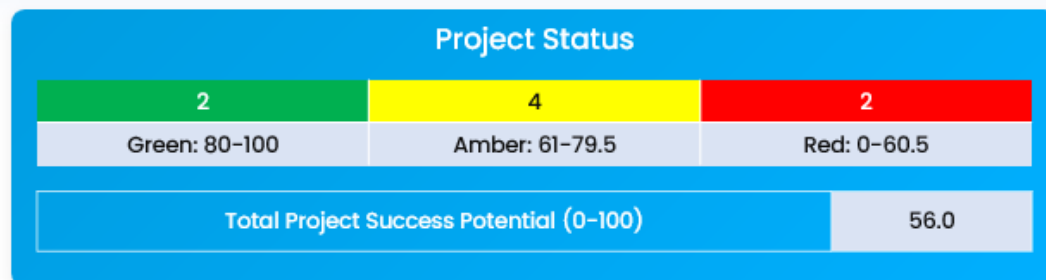- A clear optimization roadmap aligned to business outcomes

Business Value

A strong foundation to support stabilization, optimization, and future scalability, delivered as independent advisory guidance.

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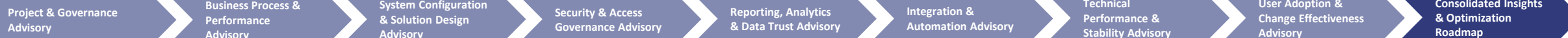
Consolidated Insights & Optimization Roadmap Example

Project Status

2	4	2
Green: 80–100	Amber: 61–79.5	Red: 0–60.5

Total Project Success Potential (0–100)	56.0

Executive Summary

› **The platform is broadly stable, but value realization is constrained** by fragmented execution across processes, integrations, data, and user adoption.

› **Manual workarounds, Excel dependencies, and inconsistent ownership** persist across multiple functional areas, increasing operational risk.

› **Optimization efforts are occurring in isolation**, without a unified prioritization framework aligned to business impact and ROI.

Example Project User Adoption Heatmap
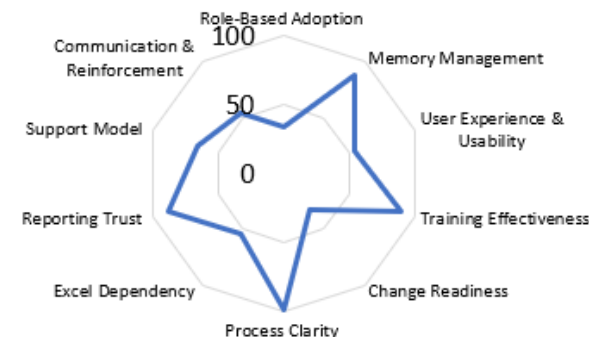
RAG	Component	Concerns	Actions	Owner
Y	Process Execution	Fragmented handoffs and offline steps	Consolidate end-to-end ownership and standardize execution	Business Owners
R	Data, Integration & Automation	Manual workarounds and weak exception handling	Stabilize data, integrations, and automation before expansion	IT / Data
Y	User Adoption	Low confidence and inconsistent usage	Introduce role-based enablement and in-system guidance	Change Lead
G	Core Platform Stability	Stable under normal operations	Maintain with proactive monitoring	IT Ops
Y	Governance & Prioritization	Optimization efforts not aligned	Establish risk- and impact-based roadmap	Steering Committee
R	Value Realization	Benefits not fully realized	Align initiatives to measurable business outcomes	Executive Sponsor

Category	Process Gap	Data Gap	System Limitation	Training Gap	Control Issue
Description	Misalignment between process and D365 setup	Incomplete or inconsistent data	Configuration or design restriction	Insufficient user knowledge	Weak approvals or permissions
Example	Manual approvals outside workflow	Duplicate vendors or incorrect posting profiles	Custom workflow bottlenecks	Excel reliance for reports	Missing workflow validations
Priority Criteria	High business impact	Operational dependency	Fix feasibility	Frequency of occurrence	Compliance risk

› DynaTech follows an **independent, risk-focused, and evidence-based advisory approach** that supports organizations **both before and after go-live** of a Microsoft Dynamics 365 and Microsoft Cloud ecosystem including Power Platform and Microsoft Fabric implementation.

› The approach is designed to provide **clear visibility, early risk identification, and actionable insights**, without disrupting ongoing delivery or replacing the existing implementation partner

Pre Go-Live Advisory Focus

Objective

› Enable informed go-live decisions by validating readiness, alignment, and risk exposure before production deployment

Advisory Focus Areas

› Solution design and configuration alignment with business objectives
› Process design readiness, SOP alignment, and control coverage
› Data readiness, migration approach, and reconciliation confidence
› Security role design and access governance readiness
› Test coverage adequacy for Day-1 operational stability
› KPI and PPI readiness to support post-go-live performance tracking

Outcome

› Early visibility into go-live risks, readiness gaps, and mitigation priorities to support a controlled and confident go-live

Post Go-Live Advisory Focus

Objective

› Provide independent insight into how the solution is performing in real operational conditions

Advisory Focus Areas

› Live system configuration behavior and transactional execution
› End-to-end process execution based on actual system usage
› Data-driven performance analysis using KPIs, PPIs, and process insights
› User adoption patterns and manual workarounds
› Reporting accuracy, reconciliation gaps, and data trust
› Integration reliability, automation coverage, and technical performance

Outcome

› A fact-based understanding of performance, adoption, and risk, supported by a prioritized improvement roadmap aligned to business outcomes

When Clients Typically Engage Us

› Organizations engage DynaTech's Benchmarking & Advisory Services at **key decision points** across the Dynamics 365 and Microsoft Cloud ecosystem lifecycle, where **independent insight and clarity** are required to reduce risk and guide next actions

When Outcomes Don't Match Expectations

› When timelines, performance, adoption, or ROI fall short of expectations, clients engage us to gain **objective visibility** into root causes across process, system, data, and governance dimensions—without disrupting ongoing delivery

Before Go-Live — Readiness Validation

› Clients engage us prior to production deployment to gain **independent confidence** that the solution is ready for real-world operations.

› This helps leadership understand **go-live risks, readiness gaps, and mitigation priorities** before business impact occurs.

When Leadership Needs Independent Confirmation

› Senior stakeholders engage DynaTech when they require an **unbiased view** of solution health and partner performance to support critical decisions, investments, or corrective actions

Shortly After Go-Live — Early Stabilization

› Following go-live, organizations often experience **unexpected issues, performance challenges, or adoption gaps.**

› The service provides fact-based insight into **what is working, what is not, and why,** enabling faster stabilization and course correction

Before Major Optimization or Scale Initiatives

› Prior to scaling Dynamics 365 and Microsoft Cloud ecosystem to new regions, entities, or advanced capabilities, clients engage us to **baseline current maturity**, identify constraints, and ensure the platform is ready to support future growth

Key Takeaway
These entry points reflect moments where clarity matters more than speed,
and where independent advisory insight enables confident, business-aligned decisions

› Organizations typically engage DynaTech's Benchmarking & Advisory Services when **operational realities, system outcomes, or leadership expectations begin to diverge**

Common triggers include:

1 **Go-live delays or recurring stabilization issues** impacting business operations

2 **Process inefficiencies and manual workarounds** increasing cycle time and rework

3 **Low user adoption** and heavy dependency on Excel or off-system tools

4 **Inconsistent or unreliable reporting,** reducing confidence in data-driven decisions

5 **Integration failures or automation gaps** creating operational risk

6 **Performance or stability challenges,** especially during month-end or peak periods

7 **Limited visibility into risks, ownership, or accountability** across the program

8 **Conflicting views between business, IT, and delivery partners** on root causes

Prerequisites

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Engagement Prerequisites

› Access to **Dynamics 365 and Microsoft Cloud ecosystem (Production, UAT, Sandbox as applicable)**

› Access to **Power Platform, Azure integrations, batch jobs, monitoring**

› Availability of **SOPs, BRDs, process maps, functional designs**

› Access to **transactional data, KPIs, PPIs, and reports**

› Availability of **business users, functional leads, IT, and support teams**

› Permission to perform **configuration review, data analysis, walkthroughs**

No.	Advisory Area	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10
1	Project & Governance	W01 – W04									
2	Business Process & Performance		W02 – W05								
3	System Configuration & Design		W02 – W05								
4	Security & Access Governance				W04 – W07						
5	Reporting, Analytics & Data Trust				W04 – W06						
6	Integration & Automation					W05 – W08					
7	Technical Performance & Stability					W05 – W08					
8	User Adoption & Change Effectiveness						W06 – W08				
9	Consolidated Insights & Roadmap							W07 – W10			

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Want to know more?

Contact Us!

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