Microsoft Dynamics 365

Modernize your subscription business

bluefort

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INTRODUCTION

How to transform your subscription business with Dynamics 365 Finance and LISA

Flexible subscriptions
Optimize administration
LISA in D365
Scalable solution
Reduction in billingg errors

Supporting modern subscriptions

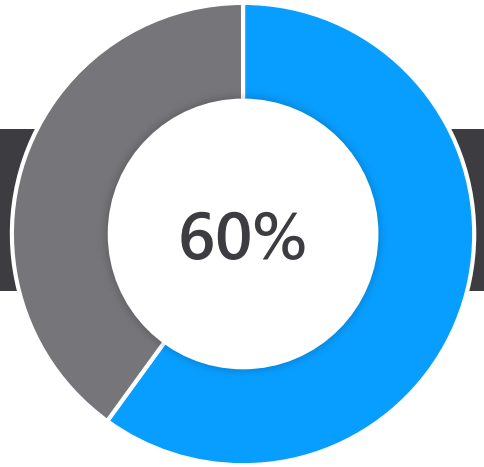
Key considerations for modernizing your subscription business

Do you have a centralized, global financial subscription management solution that can deliver intelligence and insights in real time?

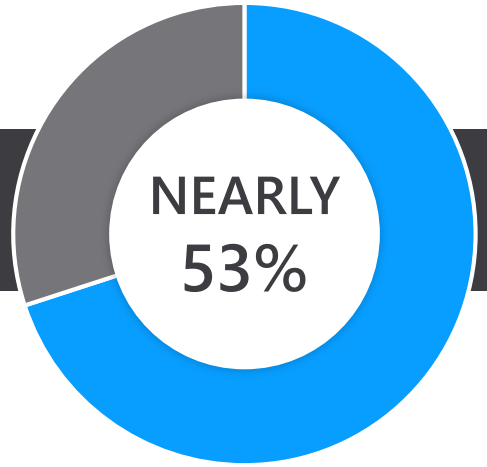
Are the technologies and tools you're using today supporting your business needs?

Are you using technology in your financial process to improve accuracy and reduce billing errors?

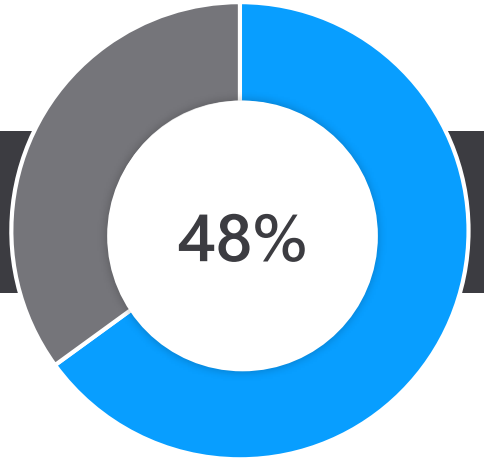
Benefits of embracing modern subscriptions



New mid-sized core financial management application projects, and 30% of large and global ones, which will be public cloud implementations by 2024



By 2022 nearly 53% of software revenue generated will be tied to a subscription model



Approximately 48% of businesses experience challenges with financial processes and reporting relating to subscription management.

"By 2020, embedded AI will become a key differentiating factor in finance systems evaluations, and vendors with this capability will be able to highlight greater functional advantages." –Nigel Rayner, vice president at Gartner

1 Gartner Magic Quadrant for Cloud Core Financial Management Suites for Midsize, Large and Global Enterprises

2 The Hackett Group

3 2019 FinTech Barometer survey

Typical financial management functional concerns

Isolated financial and billing systems, disconnected applications

Desire to automate business processes, from subscription activation to backend financial process flow

Need for workspace to allow subscription and finance teams to support customers quickly

The changing landscape

Automation of manual repetitive tasks and adaptive subscription models to the needs of the business

Integrating best-of-breed financial planning, analysis, and posting capabilities into the core financial management suite

New demand for centralized financial management apps deployed as cloud services

A focused approach to modernizing subscriptions

Modernize finance

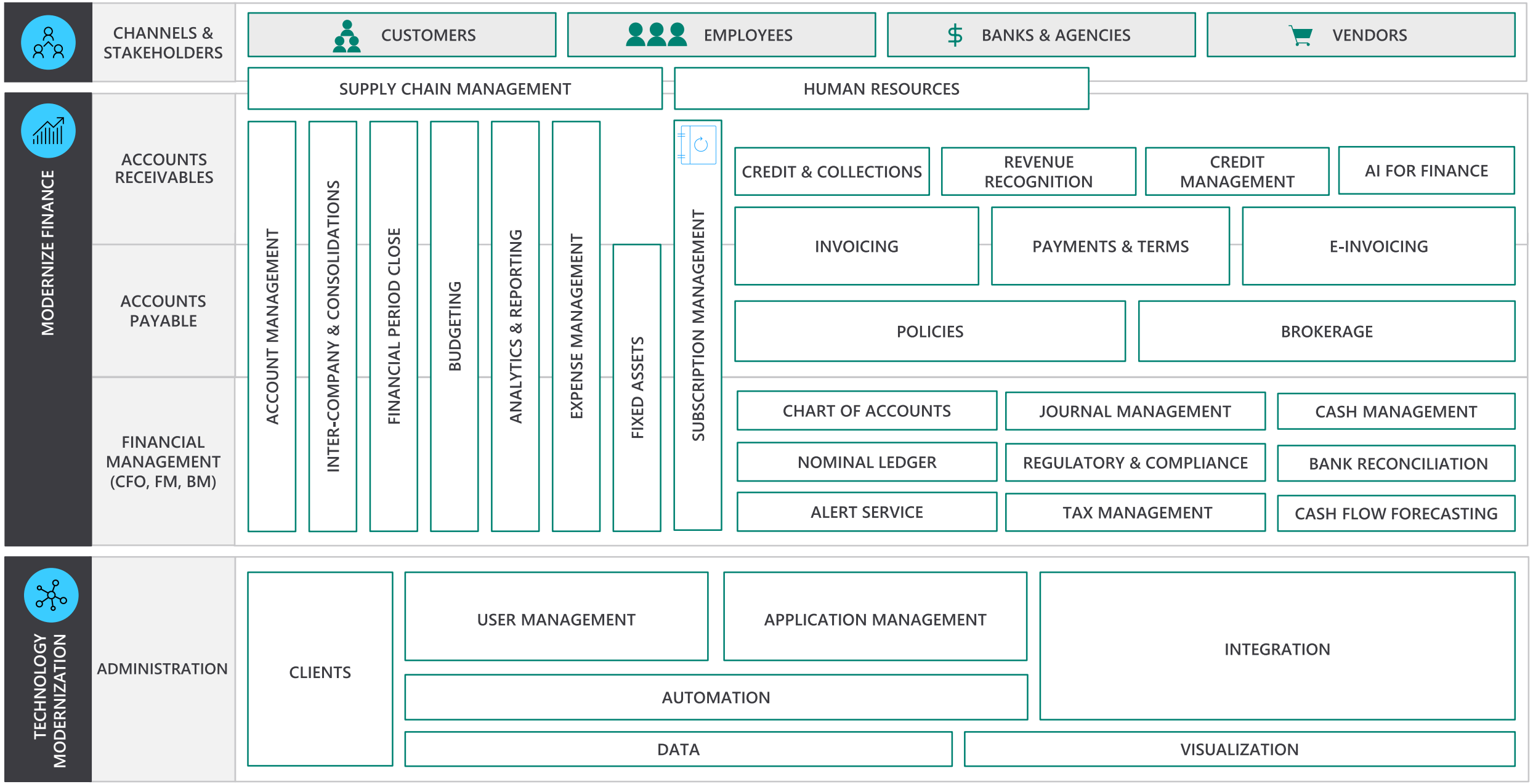
Transform finance with automated, integrated global financial processes

Take advantage of predictive analytics for intelligent recommendations

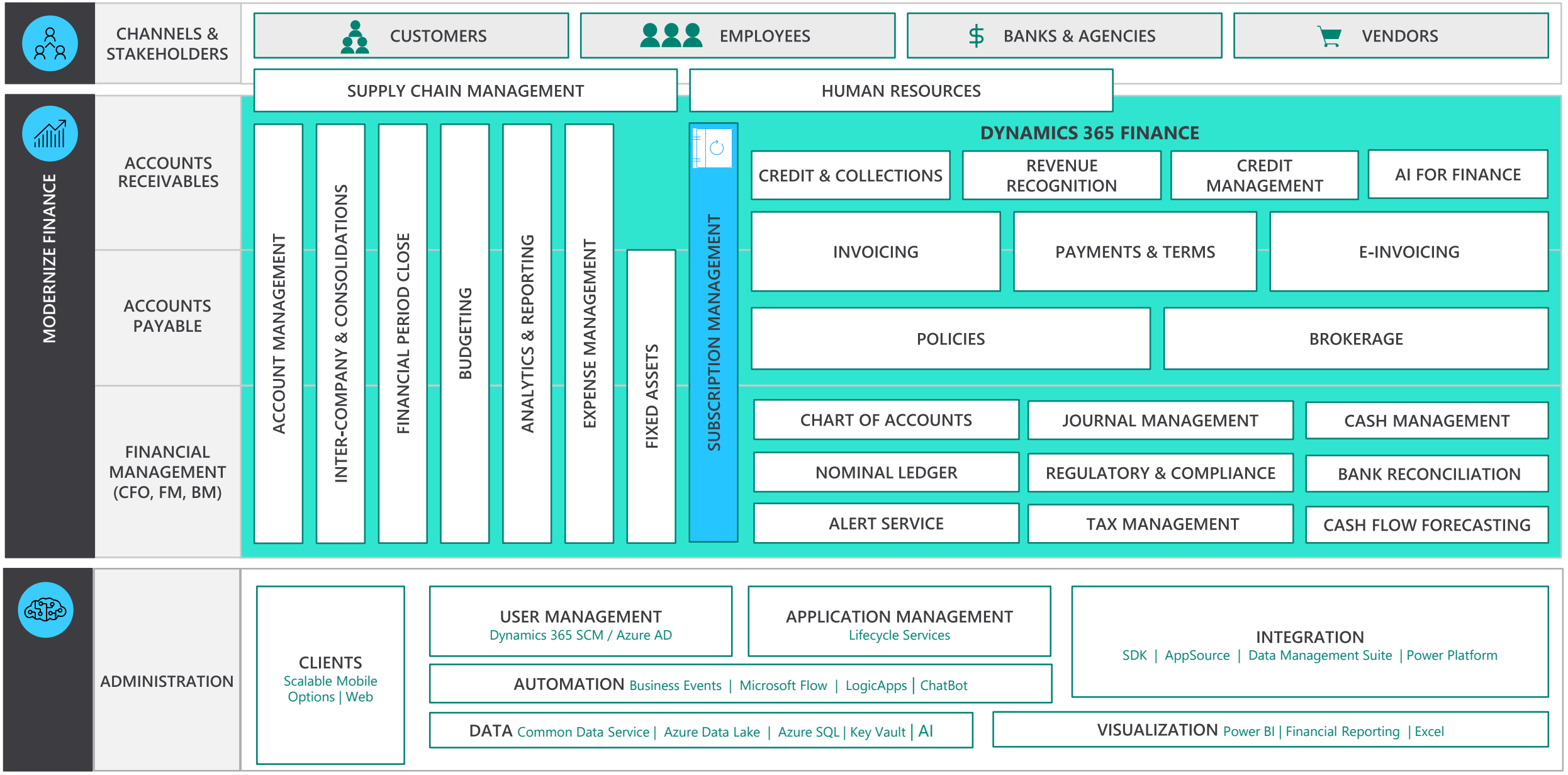
Subscriptions modernization

Simplified approach to subscription management with an adaptable framework which provides automation of key financial tasks within the familiar interface of the Dynamics 365 framework

Functions enabling modern finance



Microsoft ecosystem supporting modern finance



Dynamics 365 provides the foundation to optimize finance

Modernize finance

Centralize or distribute financial management with embedded reporting and financial analytics

Optimize your team's productivity with seamless, integrated processes and tasks

Elevate financial capabilities with intelligent processes like proactive credit management, bank management, revenue recognition, and more

Keep up with frequently changing regulatory requirements with globalization and tax configuration, e-invoicing, payment, and reporting formats

Subscription Modernization

A scalable approach to complex subscription types, incorporating business rules on difference subscription types

Provide value to customers through bundling offers inclusive of both goods and services

Automation of manual repetitive tasks such as the creation of sales orders and back-to-back purchase orders

Dedicated workspace and subscription cockpit with visualization and drilldown capabilities

Subscription modernization

- A scalable approach to complex subscription types, incorporating business rules on difference subscription types
- Provide value to customers through bundling offers inclusive of both goods and services
- Automation of manual repetitive tasks such as the creation of sales orders and back-to-back purchase orders
- Dedicated workspace and subscription cockpit with visualization and drilldown capabilities

SUBSCRIPTION
MODERNIZATION

A scalable approach to complex subscription types, incorporating business rules on difference subscription types

Subscription
Types

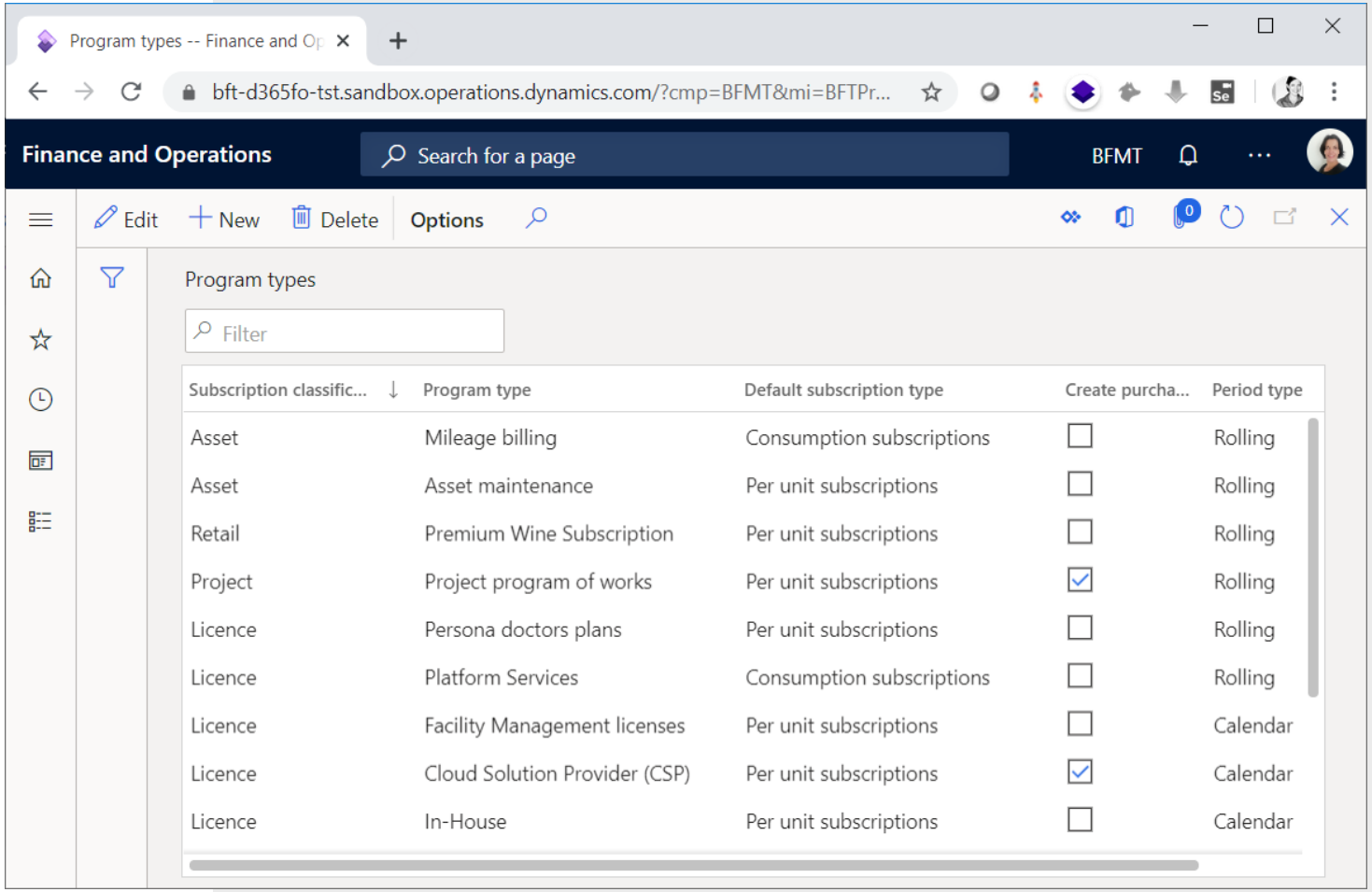
Commercial
Terms

SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Manage different plans

- Manage various subscription types linked to items, equipment, assets, project services and consumption
- Link Subscription types to flexible commercial preferences and mitigate financial risk
- Keep control of master by compiling customer-specific offers from released items suitable for subscription

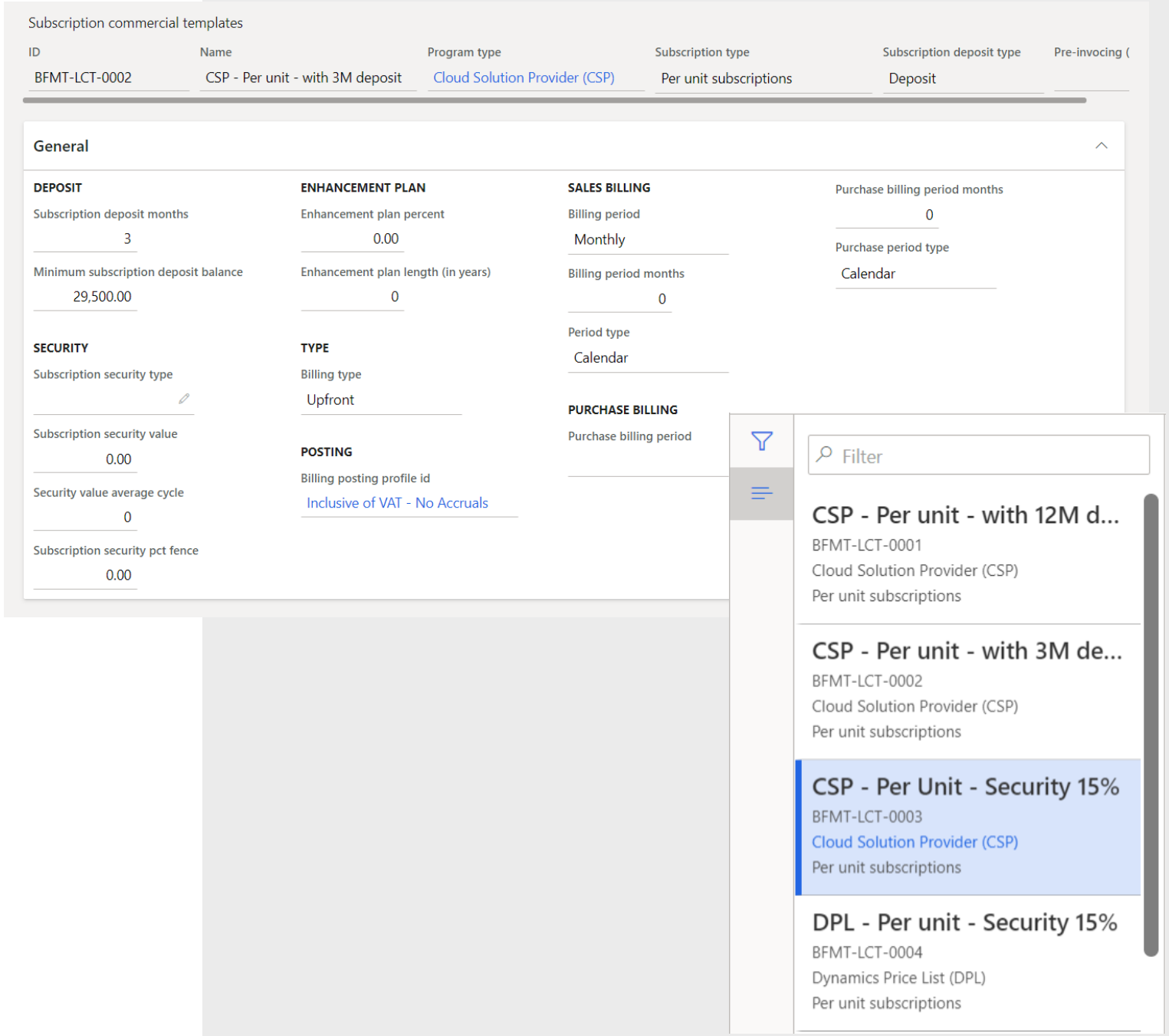


SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Flexible commercial terms

- Mix-and-match various commercial terms to subscription types to easily manage high-risk subscriptions
- Incorporate deposits against the customer account which is deducted against the subscription
- Incorporate securities against the customer account



TECHNOLOGY
MODERNIZATION

Provide value to customers through bundling offers inclusive of both goods and services

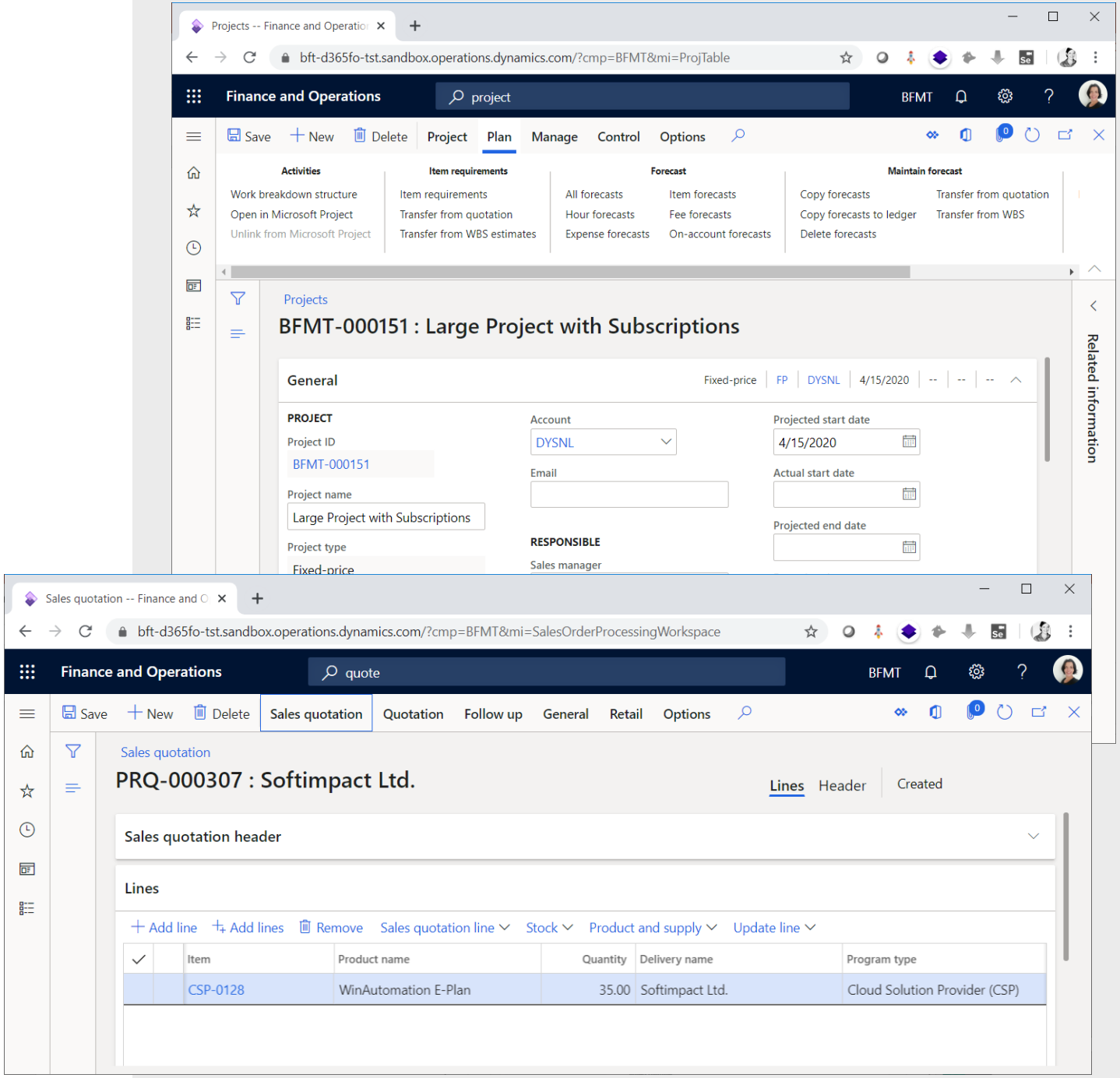
Goods and
Services

SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Offers includes both goods and services

- Activate subscriptions from Sales Quotes converted to Sales Orders
- Activate subscriptions from work breakdown structure originating from Project quote
- Seamless transaction flow from quote throughout subscription lifecycle



TECHNOLOGY
MODERNIZATION

Automation of manual repetitive tasks such as the creation of sales orders and back-to-back purchase orders

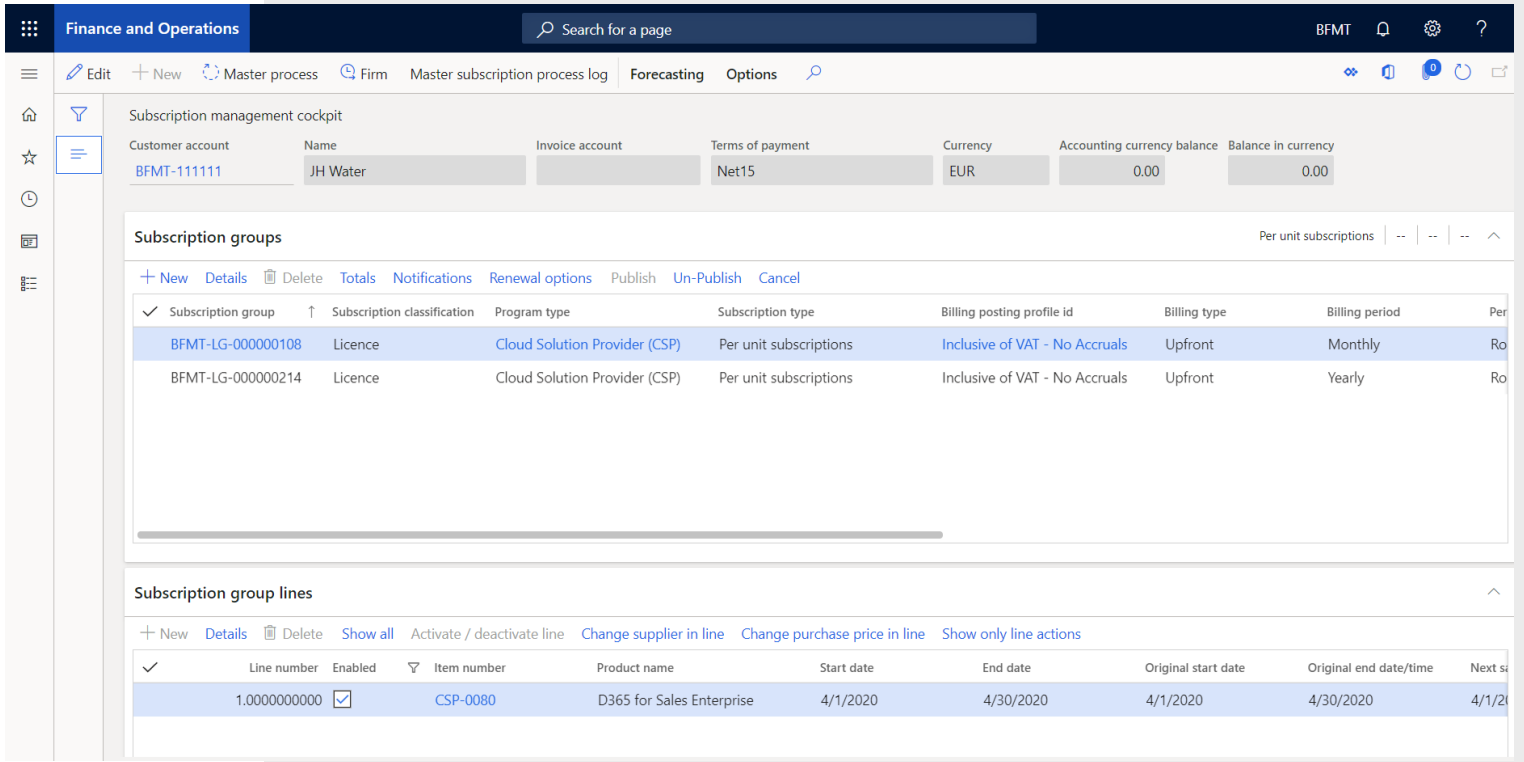
Automate recurring actions

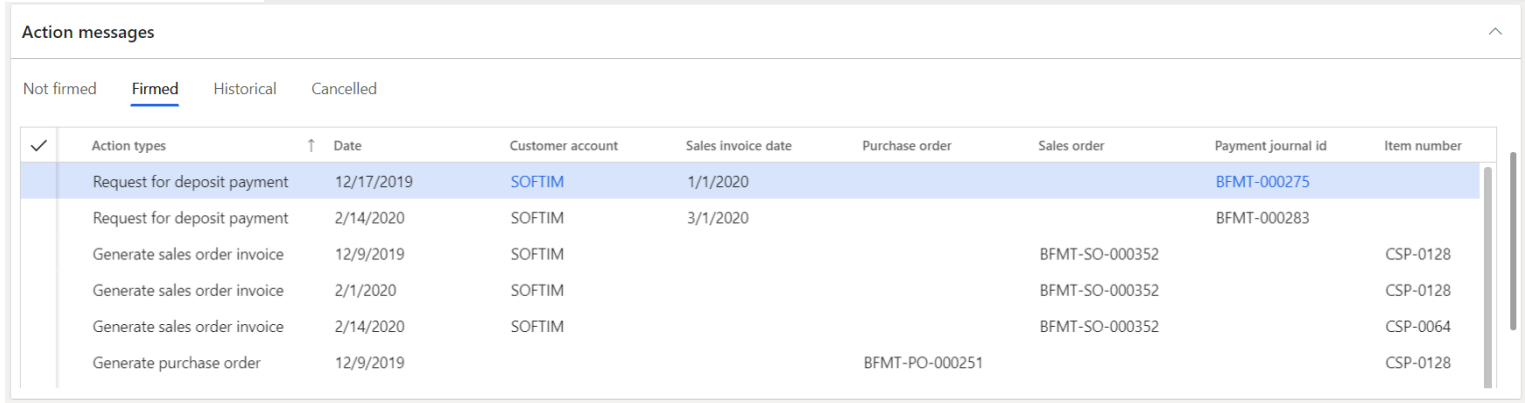
SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Automation of recurring actions

- Automatically firm subscription actions once subscription offering is published on customer profile, generating requests for securities or deposits, sales orders, related purchase orders and payment journals
- Automatically post transactions and auto-settle payments once received
- Recognize revenue over the appropriate term with or without VAT accruals



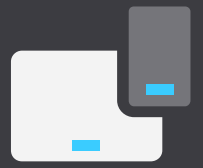


SUBSCRIPTION
MODERNIZATION

Dedicated workspace and subscription cockpit with visualization and drilldown capabilities

Dedicated
Workspace

Subscription
Cockpit



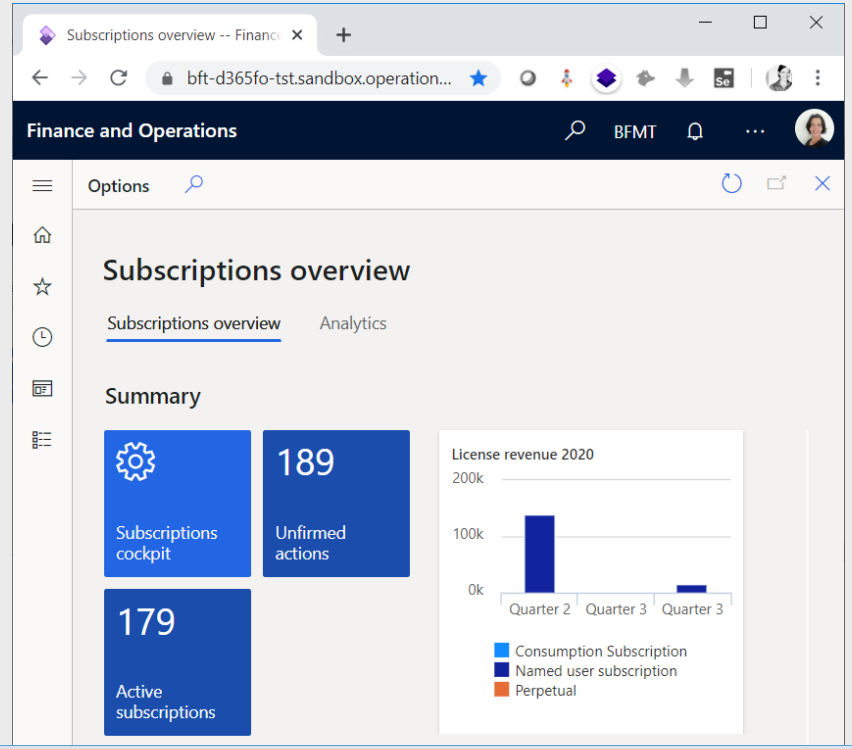
Analytics and
mobility

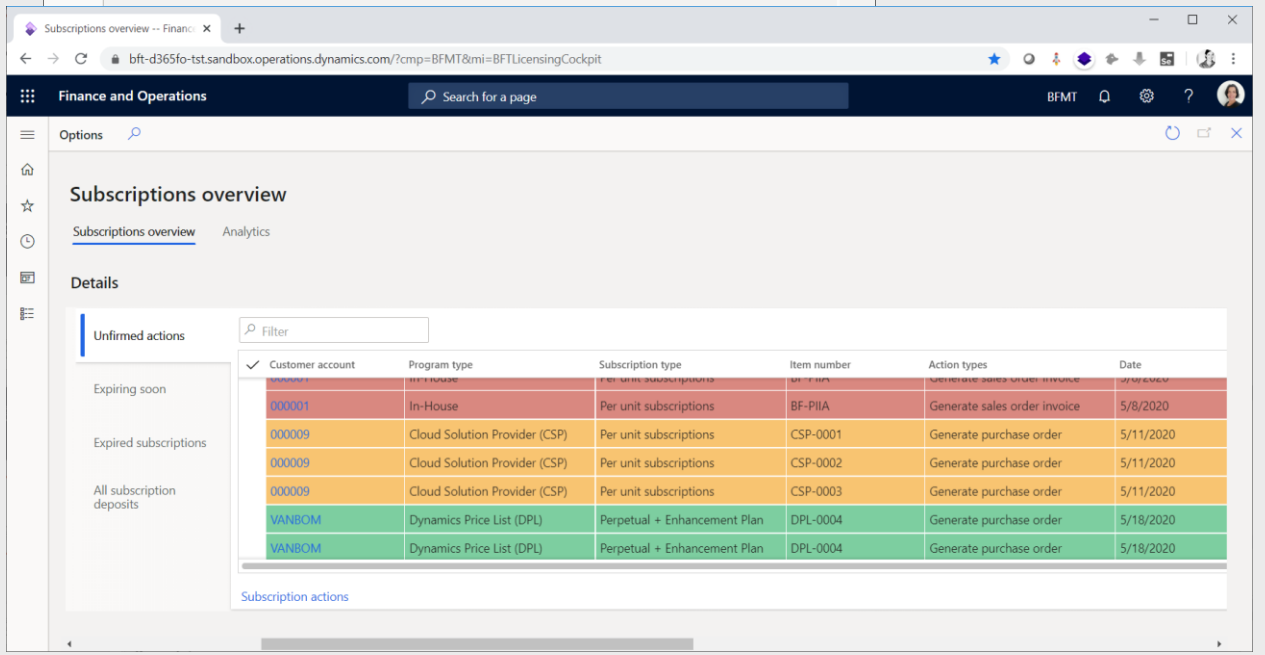
SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Dedicated workspace for subscription management

- Easily manage subscription lifecycle from the Subscription management workspace
- Quick access to subscriptions with upcoming renewals or where subscription actions are required
- Navigate your subscriptions through the familiar framework of Dynamics 365 Finance & Supply Chain and empower finance and subscription management teams with the information they need



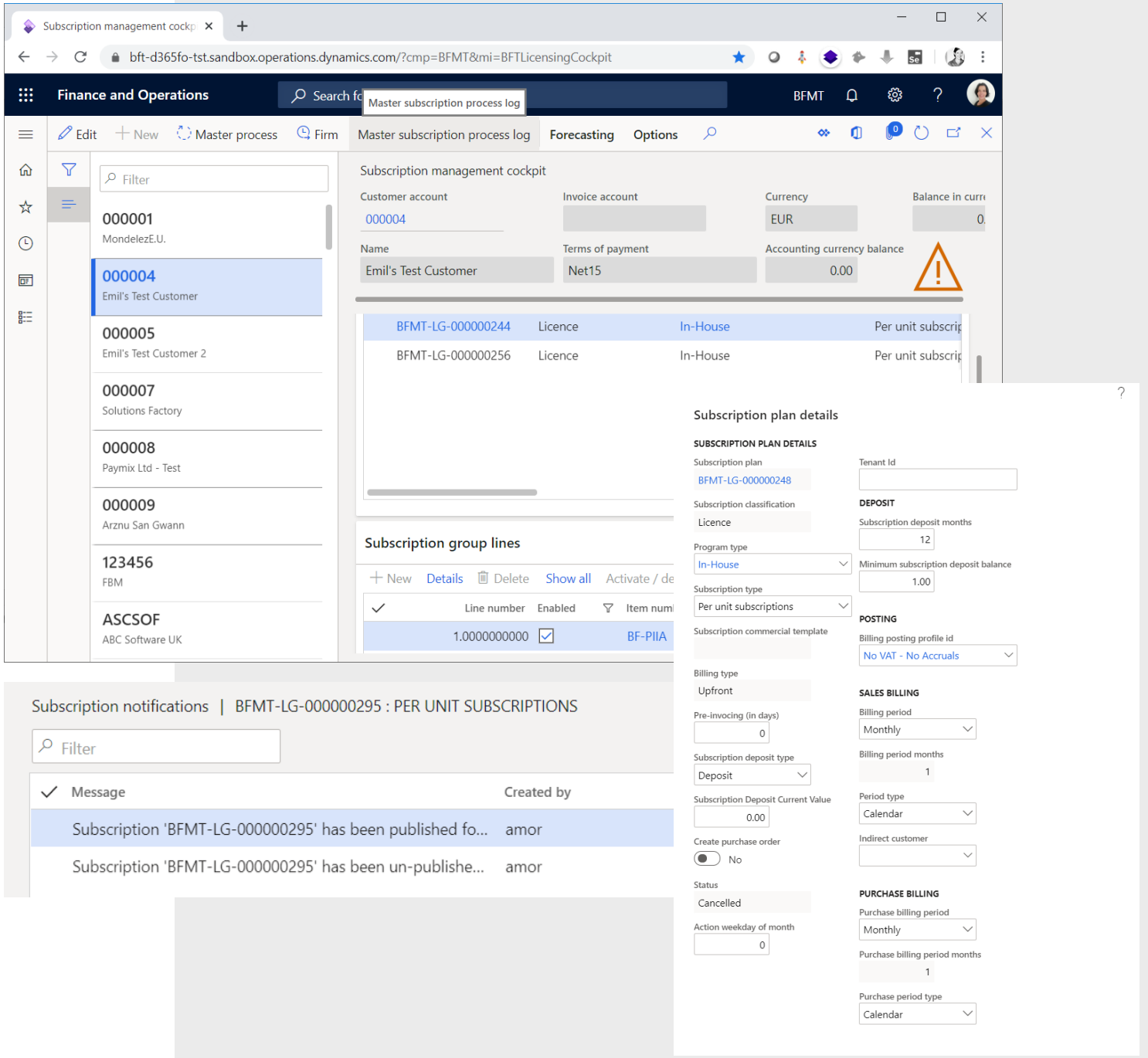


SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Subscription Cockpit

- Subscription Cockpit provides the space to conveniently manage day-to-day subscription actions
- Conveniently manage individual renewal options for your customers where specific alignment is needed with global start and end dates, and the continuation to another subscription offering
- Leverage Dynamics 365 Business Events features to drive notifications through Power Automate flows

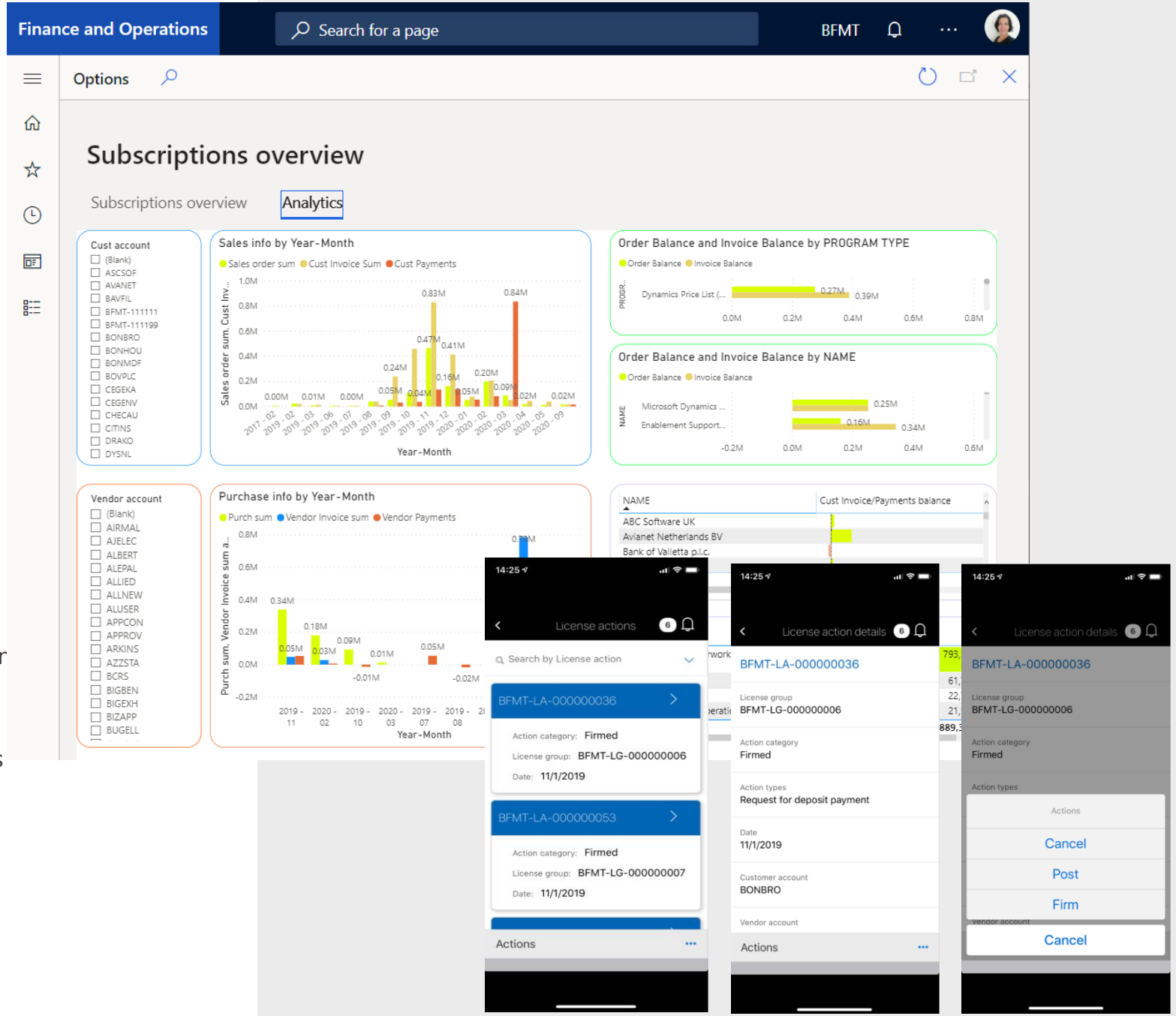


SUBSCRIPTION MODERNIZATION

Effectively manage and operate your subscription business model

Analytics and Mobility

- Embedded Power BI provides powerful reporting capabilities to analyze the profitability of your subscription business
- Work on any device from any location – mobility provides up-to-date access to information and actions
- Seamless user experience



Solution Architecture

Core

Foundational accounting and finance

Lay the groundwork with Dynamics 365 Finance & Supply Chain Management

Embedded subscription management

Enable consolidation, intercompany, credit management, and revenue recognition functions

LISA

Extend with Power Platform

Leverage Power Platform capabilities like Power BI, Power Automate, Power Apps and Power Virtual Agents

Microsoft Dynamics 365

Questions and Answers

Next steps

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